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ABSTRACT

This study evaluated the implementation of the New Zealand Curriculum in primary schools, based on case studies of seven schools. The schools ranged in size from grade 1 up to and including Grade 5, and included schools in rural and urban areas and provincial towns. Data were collected through a series of semi-structured interviews with the principals, classroom teachers, and members of the schools' boards of trustees. Results indicated that the schools varied considerably in the progress they had made toward implementing the New Zealand Curriculum. The reasons contributing to this fact included: (1) the availability of staff development; (2) the leadership of the principal; (3) teacher attitude toward change; and (4) the amount of time needed to bring about change. However, one abiding impression from the interviews was the positive reaction of principals, teachers, and members of boards of trustees to the content of the curriculum statements. Many principals and teachers felt overloaded because of the number of curriculum documents with which they had to become familiar at a time when they were still coming to terms with structural changes within the education system along with never-ending social and other pressures. However, relatively few were critical of the content of the New Zealand Curriculum. (A copy of the Principals' Interview Schedule is appended.) Contains 47 references. (AA)

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# IMPLEMENTING THE NEW ZEALAND CURRICULUM IN PRIMARY SCHOOLS

Margery Renwick • Alison Gray

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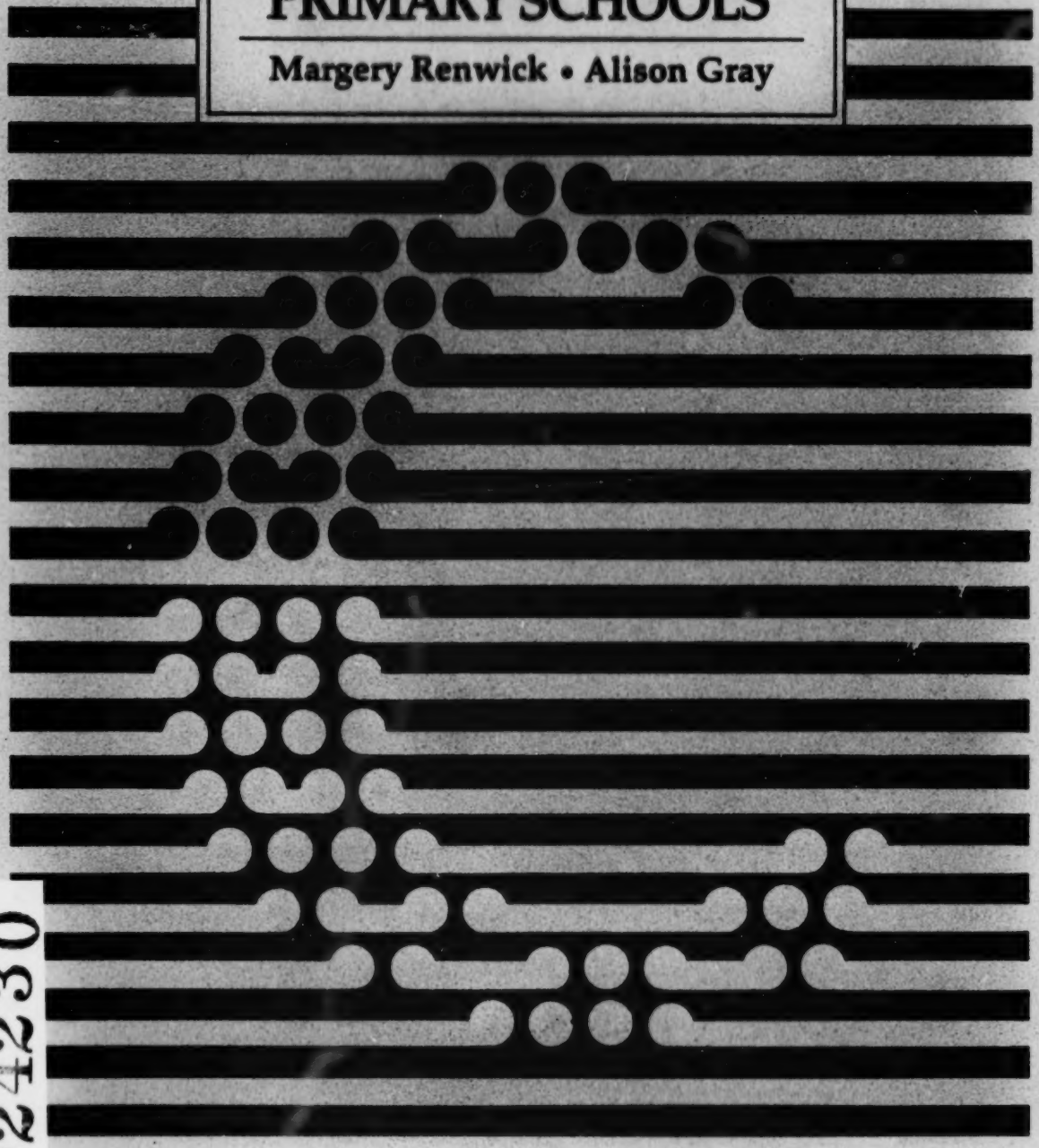

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# IMPLEMENTING THE NEW ZEALAND CURRICULUM IN PRIMARY SCHOOLS

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New Zealand Council for Educational Research

Wellington

1995

New Zealand Council for Educational Research
P.O. Box 3237
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The field work was only possible because of the willingness of staff from the 7 case-study schools to give their time and share their views with us. We would like to thank them for this.

Thanks are also due to members of the Advisory Committee who contributed to the planning of the project and commented on the draft report; to Angela Tennant for wordprocessing; and Fay Swann and Anne Else for editorial assistance.

# EXECUTIVE SUMMARY

This report presents the findings of a study designed to look at the implementation of the New Zealand Curriculum in primary schools based on case studies of 7 schools. The field work was carried out in April, 1995. The schools ranged in size from Grade 1 to Grade 5 and included schools in rural and urban areas and provincial towns. Case studies are a useful methodology for collecting in-depth data from individual schools. The small sample size means that it is not possible to generalise from the data collected in this study to the experience of other schools. However, it is likely that the issues raised are common to others.

1. The schools varied in the progress they had made towards implementing the New Zealand Curriculum but principals, teachers, and members of boards of trustees were largely positive about the content of the curriculum documents. The overall tenor of their comments reflected considerable progress.

2. A number of factors influenced how much progress schools had made towards implementing the curriculum. The key ones were:

    - the availability of staff development,
    - the leadership of the principal,
    - teacher attitude towards change, and
    - the amount of time needed to bring about change.

3. There was considerable variation amongst schools as to the kind and amount of planning undertaken with respect to the New Zealand Curriculum at the school-wide level, and in the monitoring of student progress.

4. Teachers were likely to think that there was less change involved in implementing the New Zealand Curriculum than the production of new curriculum statements suggested.

5. Most teachers thought the curriculum reform was achievable, but all commented on their increased workloads as a consequence of curriculum implementation.

6. Most teachers acknowledged that assessment was an integral part of the learning process but only 3 of the 7 schools had a school-wide policy on assessment. Assessment was an issue which concerned teachers. There was still uncertainty about how much should be assessed, and appropriate assessment methods.

7. There was little consensus in the opinions of principals and teachers as to any consequences for Maori or Maori education of implementing the New Zealand Curriculum. Bilingual teachers and

teachers in immersion classes carried an extra load.

8. Teachers felt responsible for their own individual development but most preferred to do so within a whole-school model, particularly for the implementation of the New Zealand Curriculum.

9. Teacher appraisal and teacher development were frequently linked but few schools linked appraisal specifically with the implementation of the New Zealand Curriculum.

10. While recognising that they had a legal responsibility for the implementation of the New Zealand Curriculum, most boards of trustees in the 7 case-study schools regarded the curriculum as the professional concern of principals and teachers.

# INTRODUCTION

## The New Zealand Curriculum[1]

The Picot review of education administration[2] led to wide-ranging structural changes within the education system. Important amongst these were the responsibilities given to boards of trustees for curriculum implementation and support for teacher development. The structural reforms of the late 1980s have been followed by curriculum reform in the 1990s. According to the Education Act 1989, section 61, each school board of trustees must have an approved charter which includes the aim of achieving the *National Education Guidelines* (NEGs). The NEGs include the National Education Goals, the *National Administration Guidelines* (NAGs), and the National Curriculum Statements (NCS). In order to ensure that the national education goals are met, boards of trustees and principals are required to foster student achievement by providing a balanced curriculum in accordance with the *New Zealand Curriculum Framework* and the National Curriculum Statements based upon it.

The New Zealand Curriculum, which seeks to raise the achievement levels of all students, is now the official policy for teaching, learning, and assessment in New Zealand schools. The *New Zealand Curriculum Framework* (1993) outlines the principles which are to underpin teaching and learning in schools. National curriculum statements in the essential learning areas of mathematics, science, language and languages, technology, social sciences, health and physical wellbeing, and the arts, are progressively replacing earlier syllabuses. Each curriculum statement specifies the learning outcomes for all students. In each statement, several strands of learning are identified, each with one or more achievement aims. For each of these strands, specific achievement objectives are defined. These objectives are set out in a number of levels to indicate progression and continuity of learning from the junior school to the senior secondary school in most curriculum areas. The first curriculum statement *Mathematics in the New Zealand Curriculum* was published in draft form in 1992. More recently, the Ministry of Education has provided schools with a timeline for the introduction of this and subsequent curriculum statements to help schools plan their curriculum-delivery and teacher-development programmes. The timeline includes development dates for each curriculum statement from draft material through to final published statements, and the subsequent dates for gazetting and implementation.

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[1] The New Zealand Curriculum is the term used to describe the *New Zealand Curriculum Framework* and the National Curriculum Statements.

[2] Department of Education (1988). *Tomorrow's Schools: The Reform of Education Administration in New Zealand.* Wellington: Department of Education.



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## The Research Project

This report presents the findings of a study designed to look at the impact on primary schools of implementing the New Zealand Curriculum. The aim of the study was to collect in-depth data by way of case studies about how schools were coping with the curriculum reforms; what strategies schools were putting in place to ensure their implementation; and what the barriers to change were.

### The Research Questions

I How are schools interpreting the requirements of the *New Zealand Curriculum Framework*, and how much change is entailed?

II What planning processes at system-wide and classroom level are being used for curriculum implementation?

III What methods are schools using to monitor the curriculum change?

IV What factors assist with, and what are the constraints to, change?

V How are schools using the information they have about factors which assist and constrain change to guide their future planning?

VI What are the implications of the curriculum reforms for staff and school development and appraisal?

VII What is the personal impact on teachers and what are their reactions to change?

VIII How does the school's relationship with the community affect the implementing of the New Zealand Curriculum? Are there any external factors which play a part?

### Methodology

The study was based on case studies of 7 primary schools. Case studies are an appropriate methodology for looking in depth at contemporary events in context, in this instance the implementation in primary schools of the New Zealand Curriculum. It is a flexible and adaptable method of attempting to find out what happened in relationship to what was planned, and how and why things happened the way they did. (Anderson, 1990; Burns, 1994). Because of the small sample size, it is not possible to generalise from the data collected in this study to the experience of other schools. Typically in case-study methodology multiple sources of evidence are used, including documents, file data, interviews, site visits, and direct observation. In this study, site visits were made to conduct interviews, and selected documents were examined, but the timeframe for the research precluded direct observation. It was initially hoped that the researchers might attend some school meetings but in the event this did not happen, firstly because the first school to be approached thought the presence of researchers would be intrusive, and secondly, because the visits of the researchers to the schools did not coincide with meeting dates. It was thought that to make separate visits just to attend single

meetings would not generate sufficient new data to justify the time and expense.

**Sample**

For reasons of economy and time it was decided that the primary schools would be in the greater Wellington, Marlborough, and Wairarapa regions. As well as geographic locality, the other factors which influenced the choice of schools were:

- The willingness of schools to participate. (In the event 2 schools which were approached declined on the basis of staff work overload.)
- The school roll and staff size which were considered particularly important factors in terms of school management. Schools ranging from Grade 1 to 5 were included in the sample.
- Schools which had, and had not, been involved in Ministry teacher-development contracts.
- The ethnic composition of the school roll.
- The socioeconomic rating of the school according to Ministry of Education ratings.
- Education Review Office reports.

Data were collected largely through a series of single, semi-structured interviews of:

- The school principal. N = 7

- All, or a sample of, the classroom teachers depending on school size. In schools where a sample of teachers were interviewed these included the deputy principal, assistant principal, syndicate leaders, teachers with curriculum responsibilities in mathematics or science, the most and the least experienced teacher, and the teacher whose surname began with the letter "C". We also interviewed 2 teachers responsible for bilingual units and 2 in a technicraft unit. The teachers and principals interviewed fell into 3 almost equal groupings of those who had taught from 1-9 years; 10-19 years; and 20 plus years. They were equally likely to have had most of their teaching experience in either the junior school or the middle and senior school.
  N = 40

- the chairperson and other members of the board of trustees. N = 13

Total Interviews N = 60

Examples of the documents examined were: school policies; the school development plan; curriculum statements; assessment documents; and board of trustees minutes.

**This Report**

We have not attempted in this report to write up case-study reports of individual schools but rather have focused on the main themes of the interview questions. A major reason for this approach has been the need to ensure that individual schools and teachers were not identified when their confidentiality had been assured.

The draft report was sent to the 7 case-study schools before the final report was prepared. No adverse comments were received.

**Research and Other Literature**

The findings from this case-study research need to be seen alongside other recent New Zealand studies which have focused on the delivery of teacher-development programmes in connection with the New Zealand Curriculum, for example *Mathematics and Science in the National Curriculum: Evaluation of the Teacher Development Programme* (Gilmore, 1994), and *Teacher Professional Development: School Based Curriculum Development* (Newth, 1995), as well as the unpublished interim reports of Ramsey, Hill, Harold, Lang, Patara, & Yates (undated) based on their work on school-based curriculum development in the Waikato. The study by Wilson and Houghton (1993) *Teacher Development Expenditure and Activities in Schools* is also relevant. Many of the issues raised in this report have already been commented on in these earlier studies, for example, the importance of the leadership qualities of the principal and her/his ability to foster a strong professional culture; the importance of collegiality of staff and level of communication within a school; the variability of staff familiarity with the curriculum statements; the minimal knowledge most teachers have of the *National Education Guidelines* (NEGs) which include the *National Administration Guidelines* (NAGs); the increased staff workload of implementing the curriculum statements; lack of time to reflect on documents; increased enthusiasm for curriculum statements if teachers are involved in a teacher-development contract; reluctance of board members to get involved in curriculum matters; concern with assessment issues; a preference for whole-school development rather than a few staff being involved in contracts; lack of progress in strategic planning in some schools; and lack of systems for monitoring the implementation of the curriculum.

There is also a wealth of literature on school management and managing change in education which we have consulted for this study but have not reviewed in detail. Among the more significant recent New Zealand publications are the National Education Evaluation Reports of the Education Review Office, including: *Self-Review in Schools* No.3 Autumn 1994; *Inservice Training of Teachers* No.5 Autumn 1995; *Core Competencies for School Principals* No.6 Winter 1995; and *Managing Future Uncertainty* No.8 Winter 1995. (The last 3 of these documents came out after the field work for this project was completed.)

Schools are also kept informed about curriculum matters through articles and announcements in the *Education Gazette*. However, because the *Education Gazette* is a periodical, we found that teachers were more likely to consult this publication for job vacancies than for other professional matters. This meant that much valuable information was not readily accessible for teachers. The fact that the NEGs were published only in the *Education Gazette* helps to explain why so few teachers were familiar with them. The recent series of curriculum information pamphlets published by the Ministry of Education for parents and trustees, for example, *Mathematics in the New Zealand Curriculum*, was certainly appreciated by boards, and also by teachers, because of their useful summaries of recent developments.

## The Documents

Throughout the interviews we asked the principals and teachers to keep a number of policy documents in mind:

*The National Education Guidelines* (NEGs) which include the National Education Goals, the *National Administration Guidelines* (NAGs), and the National Curriculum Statements (NCS).

*The New Zealand Curriculum Framework*, the major policy document which underpins the New Zealand Curriculum.

The guidelines on assessment for schools, *Assessment: Policy to Practice*.

During the interviews the principals and teachers tended to focus on the various curriculum statements, particularly mathematics and science, except when *Assessment: Policy to Practice* was referred to specifically in connection with assessment (*see* p. 45).

## Factors That Might Influence Staff Perceptions

As the study progressed, it became clear that certain factors were likely to influence the way principals and teachers perceived the documents, and the implementation process.

**Issues That Appeared to Influence Principals' Perceptions**

- Whether or not a principal also had responsibility for a class.

Three of the principals did and 4 did not. One of the teaching principals taught for half days only. (Sixty percent of principals in New Zealand primary schools are teaching principals.)

- Whether or not a principal had had recent classroom experience.

For example one principal, who was now a non-teaching principal, had recently arrived from a school where she had held a teaching principal's position.

- The length of time a principal had been in the school.

Five of the 7 principals interviewed had been at the school at the time when the first documents arrived, but one had only been in the school for 15 months, so that revised mathematics and science curricula had been introduced at the school before her arrival.

- The size of the school, which influenced the amount of delegated responsibility possible within a school.

**Issues That Appeared to Influence Teachers' Perceptions**

- Their length of teaching service. The more recently trained teachers tended to be more conversant with the documents.
- The length of time teachers had spent at the present school.
- Their experience at previous schools.
- Whether or not they had returned to teaching after a break in service.

- Their involvement in teacher-development contracts.
- Their areas of curriculum responsibilities in the school.
- Whether they were teaching in all curriculum areas.
- Their areas of personal interest.
- The ethos of the school and attitude of principal and other staff.
- The size of the school.

# INTRODUCING THE NEW ZEALAND CURRICULUM INTO PRIMARY SCHOOLS

We began the interviews by asking principals what they considered their responsibility to be in relation to the documents and the procedures they had followed to introduce the documents to staff and the board of trustees. Teachers and members of boards of trustees members were asked how they were introduced to the documents.[3]

## The Principal's Responsibilities

We found that the way the principal interpreted his or her responsibility with regard to implementing the New Zealand Curriculum (particularly the curriculum statements) and their attitude towards change, and how much change was involved, had a major impact on what was happening in each of the 7 case-study schools. Four different approaches (not necessarily mutually exclusive) were described by principals.

### 1. Leadership Role

While all the principals considered that the main function of the school was to ensure that students were provided with a balanced curriculum, not all thought this required them to play a "hands on" leadership role in curriculum implementation. Nor did they necessarily consider that they were obliged to ensure that the New Zealand Curriculum was being implemented according to the timelines suggested by the Ministry of Education - 5 did and 2 did not.[4]

Principals who were also classroom teachers all played a leadership role in curriculum implementation as active members of teaching teams. Of the 3 non-teaching principals one appeared to play a much more active role in curriculum implementation than the other 2. While this principal also recognised that his teaching staff were more closely involved in the day-to-day implementation of the curriculum than he was, he regularly spent time in classrooms working with children, and participated on an equal footing with staff on teacher-development contracts and at curriculum meetings.

The nature of her sole-charge position made it inevitable that the one principal in a sole-charge school had to be familiar with the documents at a practical, classroom level. She also had a positive attitude to change and played an active role in the community. She regarded her teachers' aides as

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[3] Information about boards of trustees, including the responses of members of boards of trustees to all interview questions is considered in a separate section of the report. See The Role of Boards of Trustees in Implementing the New Zealand Curriculum, p. 73.

[4] Schools are not legally required to implement the curriculum statements until they are gazetted. There is an expectation, however, that schools will be working towards implementation.

staff and believed that as principal she had a responsibility to ensure that they were familiar with the documents. To this end, even though the two teachers' aides were not trained teachers, the principal had introduced them to the documents as they arrived, and one of the teacher aides had attended curriculum courses designed for teachers. The principal had no reservations about the abilities and competency of the teachers' aides whom she described as "just brilliant".

**2. Delegated Responsibility**

Two principals had delegated prime responsibility for curriculum implementation to senior teaching staff. One of these schools had a teaching staff of 15 plus support staff, and the other a staff of 13. These two principals emphasised the wide range of the demands placed on them within the school, of which the curriculum was only one. As they were both non-teaching principals, they were less familiar with the documents than their teaching staff. In the words of one of these principals:

> One of the big points I was going to make is that the non-teaching principal is perhaps less informed, less knowledgeable, less aware of the implications of all this than the teaching principals who actually have to work with the teachers and discuss it. We've perhaps become more proficient at the non-teaching things like policy and finance. It's the way it's evolved. I've stated very clearly to my senior teacher group that it is you, the middle managers who are the instruments for change and the implementation of the curriculum. I can only help you and support you and guide you as much as I can, but you are the people who are actually using it along with your teachers. I put a lot of responsibility on my middle managers. To me the curriculum implementation, the professional side, is just another aspect, along with finance and property and everything else. I've got to fulfil the regulations and make sure the teachers get enough training and inservice work, and that there's sufficient planning to make sure we implement what's in the curriculum.

The second of these principals described himself as a facilitator rather than curriculum leader. He saw it as his responsibility to make sure staff had the "time free from other workloads to be able to give their attention and energy to curriculum implementation." While he accepted that he had ultimate responsibility for the curriculum, he believed that the reality of his administrative workload meant he had to delegate.

This same principal said he considered the responsibility for implementing the New Zealand Curriculum was "quite burdensome", and although he accepted he had an overall responsibility for curriculum implementation he could not be expected to be conversant with the detail of individual curriculum statements. He said he was "totally overwhelmed by the sheer volume of the stuff" he was supposed to be implementing and his "mind was almost numb" trying to cope with the amount of documentation. For this reason he was pursuing a policy of staff "nibbling at what we can realistically manage" so that "staff don't fly to pieces or suffer from over stress", rather than adhering to Ministry of Education timelines.

**3. Focus on Children's Needs**

If questioned, all principals would probably have said that they and their staff had a responsibility to address the needs of the children in their school but 3 principals focused on this responsibility when they discussed their role in curriculum implementation. For one this meant she was not attempting to follow the Ministry of Education's timeline for implementing the New Zealand Curriculum. She considered her prime responsibility to be to the learning needs of children at her school. While this

did not preclude using the curriculum statements as a basis for classroom teaching and learning, it did mean that they were only one of a series of documents that teachers might use, and not necessarily the prime focus of classroom planning. While she acknowledged that "We obviously can't go off on a wild goose chase to the left or the right", she believed the learning needs of the children in the school must come ahead of implementing the New Zealand Curriculum to a timeframe determined outside the school. Her perspective was similar to a view expressed by Ramsay and others that "schools are being driven by outside constraints, especially Ministry of Education established timeframes and contracts, and this is not as effective as determining their own curriculum needs" (p. 21).

A second principal thought his main responsibility was to relate the New Zealand Curriculum to the children's needs. As an overriding theme of the documents was that classroom programmes should be based on children's needs, using the curriculum statements was an appropriate approach. However, this did not mean that the curriculum statements had to be followed "slavishly". The third principal, who was concerned that ". . . people are using it [i.e. a curriculum statement] as a bible with the direction of the teaching coming from the document rather than from the kids", went on to say that it was possible to do both - "to focus on the children and use the documents". She liked the documents because she felt she was able to "give them my interpretation" and not just "follow a process".

#### 4. Gatekeeping Role

Several principals saw themselves as gatekeepers for staff, and tried to monitor the impact of implementing the various curriculum statements. One, for example, said she did not want to be a controller of information but nor did she want her staff to be overwhelmed by the pace of change. Another described himself as having a "cushioning role" to protect the staff from being overwhelmed by the speed of change. Compared within the past when curriculum change was ongoing but at a manageable pace, now ". . . all of a sudden the skies have opened and it's been dumped on us very, very quickly".

## The Procedures by Which Staff Were Introduced to the Curriculum Statements

### Initial Contact

The teachers in one school described a strong leadership approach by the principal. Their initial contact with the documents had been when the principal introduced the documents to the staff at staff meetings. However, it was a more common practice for the various curriculum statements to be distributed to individual staff with little comment, and for a more systematic approach to their implementation to be pursued at a later date, either through in-house staff meetings or teacher-development contracts, or a mixture of both.

A few teachers were critical of what they regarded as a casual approach to their introduction to the documents. One teacher for example said she was introduced to the documents by the principal only in the sense of "Here they are, look at them". A second teacher commented "The stuff keeps arriving from the Ministry all the time and you just go on doing your job".

**Teacher-development Contracts**

The most common and, in the view of most teachers, most effective way by which the various curriculum statements had been or were being introduced to staff was through selected staff taking part in teacher-development contracts and then taking a leadership role in introducing other staff to the document, usually through a series of staff meetings. Most schools had gone through this process with mathematics and science, and several were now doing the same with English, social studies, and technology.

Schools followed different procedures for the selection of teachers to go on courses. In some schools it was entirely dependent on the interest of individual teachers. In others senior teachers identified which teachers should go. A few schools had been involved in whole-school development courses.

As with all issues related to implementing curriculum there were a few teachers who were cynical of the teacher-development contracts. The most resistant teachers, and there were only 3 or 4, claimed that while those teachers who were selected to go on courses had the responsibility to become familiar with the documents, they themselves were so overloaded they "put them on the shelf" until they were "forced to open them". (For a more detailed account of teacher development *see* p. 63.)

## Staff Familiarity With the Documents

The *National Education Guidelines* (NEGs) including the *National Administration Guidelines* (NAGs)[5]

It was a common perception of principals that members of boards of trustees would be more familiar with these guidelines than staff, because teachers were more concerned with the day-to-day running of classrooms, and had less to do with the governance and management of schools. Interviews with the teachers certainly confirmed that the NEGs and the NAGs were guidelines staff were least likely to be familiar with. At least a quarter of the teachers said they had not seen them, did not know what they were, or had only glanced at them.

Two principals also acknowledged that they had only recently become familiar with the NEGs and the NAGs, in both cases in conjunction with a visit from the Education Review Office. One commented that he had "completely overlooked" the statements because "they were tucked away on page 4 of the *Gazette*". This had been rectified and the Board had prepared a draft policy based on the NEGs and the NAGs.

One principal indicated that he had worked with staff on the NEGs and the NAGs before a visit from the Education Review Office. Prior to that he thought the staff would have regarded the NEGs and the NAGs as "just another bit of paper". He also commented that one of the reasons why the NEGs and NAGs were not a big issue for staff was because the school was fulfilling most of their requirements. In most schools, staff were dependent on *Gazette* notices for any understanding they had of the NEGs and the NAGs, but in this school a local adviser produced a bulletin called, *Your Charter is Changed, Did You Know?*, which was very helpful.

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[5] As indicated earlier (*see* p. 1) the *National Education Guidelines (NEGs)* include the National Education Goals, the *National Administration Guidelines (NAGs)*, and the National Curriculum Statements (NCS). However, teachers tended to refer to the "NEGs and the NAGs" as though they were separate entities.

*The New Zealand Curriculum Framework*

Comments about staff familiarity with the *New Zealand Curriculum Framework* ranged all the way from one principal who said that all staff had a copy, but he had no idea how familiar they were with it, to another who was confident his staff were conversant with the document. This principal had run a staff meeting after he, and 2 board members, had attended a course run by the local college of education, to examine the *New Zealand Curriculum Framework*. At the staff meeting he presented a pyramidal chart which linked the *New Zealand Curriculum Framework* to the various curriculum statements and supporting documents, and then to the school's programmes of work, teachers' work plans, including assessment and the implications for children.

The range of views expressed by principals as to teachers' familiarity with the *New Zealand Curriculum Framework* probably accurately reflected the reality of the situation. When questioned, most teachers appeared to be aware that it was the base document which underpinned the curriculum statements, but teachers ranged from those who believed they were thoroughly conversant with the document (perhaps prompted by preparation for a visit from the Education Review Office) to one who did not recognise it but thought it might have come out when she was overseas and another who "vaguely recalled it coming but knew nothing of it now", and yet another who commented,

> I don't think anyone would have read the framework unless they were forced to take it to a course. It will be on their shelves though.

A few, while not opposed to the document, found it rather high minded "pie-in-the-sky stuff".

*The Curriculum Statements*

It was hard to get a clear picture from the principals' comments as to how familiar they and their staff were with the various curriculum statements. The principal's familiarity was undoubtedly influenced by whether or not he or she was responsible for a class. With one exception the teaching principals appeared to be more familiar with the individual curriculum statements than the non-teaching principals. As teaching principals it was not a case of introducing the statements to other staff so much as becoming familiar with them along with other staff. Teaching principals also tended to be more actively involved in teacher-development contracts than non-teaching principals. The sole-charge principal certainly considered herself to be very familiar with all the documents and had been on teacher-development contract courses for mathematics, science, English, social studies, and technology during the previous 2 or 3 years. She valued the fact that she was able to attend such a wide range of courses, compared with when she had been a Scale A teacher. At that time she had been responsible for designated areas and did not know much about others.

A second principal commented:

> I would say I'd be pretty familiar with them. The staff's familiarity will vary. The DP has obviously used the English one very closely and been involved in the handbook that's going to come with it. I know the mathematics curriculum and assessment ones well. I have a particular interest in social studies so I have read that one and in my last school we were working on science, so I have used that as a teaching document in my class.

Of the curriculum statements, principals usually thought staff were most familiar with the mathematics and science documents which staff were likely to have been working on most recently and for the longest period of time. But even with the first 2 curriculum statements, one principal said he had no idea how familiar individual teachers would be with them. Familiarity with English, social studies, and technology depended very much on individual teachers' interests, their responsibilities within the school, and whether or not teachers were currently taking part in curriculum contracts.

The teachers themselves expressed a range of views about their familiarity with the curriculum statements ranging from those who described themselves as "quite familiar" with at least 3 documents, to a teacher returning to service who described herself as "reasonably vague" about all of them. Two typical responses would be:

> With the mathematics and science I feel comfortable. English I'm learning and the social studies now that I'm on the contract myself. It's really a neat one and I'm enjoying it. Excellent.

> I consider myself very familiar with science. It is an interest of mine but it was an interest which was spurred by the contract. The English one I am becoming familiar with. The mathematics one I still struggle with. I find it difficult to use. I often have lots of questions after I have referred to the document about what I actually should be teaching.

Teachers appeared to vary according to length of teaching service. This is illustrated by the following 2 quotes - the first by a long-serving teacher and the second by a first-year teacher.

> I don't feel familiar with them but I have to get over that feeling and open them up. They do involve a big change and you have to drop a lot of the old thinking. I used to be much more activity-based, thinking up lots of fun activities for the children to do but I didn't always know what the outcome was meant to be. I now have a much clearer idea of why I'm doing what I'm doing.

> When we went through the mathematics document to me it was nothing new but I was surprised at how scared the others were of it. . . . I did mathematics as my subject study at college so the mathematics document I went through basically with a fine-toothed comb and the science one the same. Both I know basically off by heart.

Various other factors contributed to teachers' familiarity with the curriculum statements. These included:

- The extent to which the documents were used for planning at the school or syndicate level. In most schools at least 2 of the curriculum statements, science and mathematics, were the key documents for curriculum planning, but in others the documents were peripheral to planning or used as reference sources along with other publications.
- The degree of collegial planning particularly at the syndicate level. Where teachers supported each other in this way they learnt from each other.
- Whether or not they were teaching a particular curriculum area. Two teachers, for example, did not teach mathematics.

It was also common for teachers to be selective in their reading of the documents so that they were familiar with what they considered to be necessary for their level of the school only. There were also

those who were feeling overwhelmed by the number of documents with which they had to become familiar and did not want to tackle any more at that time.

Two or 3 teachers were resisting becoming familiar with the final English curriculum statement because they considered it differed markedly from earlier drafts.

We formed the impression that while individual teachers in all schools were familiar with at least two curriculum statements and were using them regularly in the classroom, the staff of smaller and middle-sized schools were more likely than those in the largest schools to be working collectively on the documents as a team.

## Superficial Familiarity or Real Understanding of Curriculum Statements

We had no means of ascertaining the depth of teachers' familiarity with the curriculum statements. What did teachers mean when they said they were "familiar with the documents?" One teacher, for example, said she thought she was familiar but was not sure that she was using the documents "correctly". And another teacher said she was familiar because the teaching approaches advocated in the documents were not new but were what she was using already.

One principal commented on the length of time it was taking staff to become familiar with the documents. Speaking of the mathematics curriculum statement, he said he thought it was only now, 3 years down the track, that staff were completely conversant with the document and its implications for children, but he has been forced to reconsider whether staff had as complete an understanding of the documents as they thought they had. The results of recent mathematics tests within the school had been disappointing. He thought that perhaps teachers, although they had read the documents, were not aware of the depth of the changes required to their teaching to get the desired results from children. He interpreted the poor test results as meaning that the staff were going to have to re-visit the mathematics curriculum statement, even though initially they had taken part in a whole-school development programme. This time round more attention would have to be paid to working alongside teachers and supporting them in the classroom.

One principal estimated that it will take 10 years before teachers become familiar with all curriculum statements.

## The Language of the Curriculum Statements

The language of the documents was a stumbling block for one principal, particularly as he did not have a classroom responsibility with regular opportunities to see practical application in the classroom. As he said, "Even if you've read it once, it doesn't mean anything until you're actually starting to use some of the material."

Individual teachers had similar problems. One beginning teacher said she found "The English curriculum statement really difficult to understand. I think it's quite complicated really and it jumps around a lot compared to others". However, more teachers than not found them "user friendly" once they were familiar with the general pattern and layout of the documents.

## Staff Agreement With the Philosophy and Principles of Documents

On the whole the documents were viewed positively. There was general consensus amongst the principals that they and their staff were in agreement with the philosophy and principles on which the documents were based. An exception was one of the principals who were not committed to implementing the New Zealand Curriculum according to the Ministry of Education's timeline. She thought that a certain philosophy of learning was "pushed" to the exclusion of others. She considered the teaching approach advocated in the curriculum statements to be constructivist, and was uneasy when only one approach was presented. She could see the need for revised curriculum statements although she did not know whether these were any better than earlier ones.

A minority of teachers were critical of the documents. One, for example, thought the mathematics document was based on a "totally new untrialled approach". Another experienced teacher referring to mathematics said she found the new document:

> . . . very difficult to handle. Sometimes I don't know what they're talking about and I've been teaching mathematics for 30 years - it was considered one of my major strengths. I find it very hard at this stage of my career to turn my thinking about how to teach mathematics upside down . . . and to start with children not knowing things and then asking them to do things - it's the philosophical approach the document seems to be based on.

Yet another teacher critical of the "sociological approach" which she believed characterised the social studies curriculum statement found the thought of having to develop appropriate resources so overwhelming that she'd "shuddered and shut that one". A few teachers said they did not know the documents well enough to comment.

However, most teachers were positive in their comments. Many said they enjoyed using the documents and referred to the curriculum statements as "suiting their style of teaching" and "enhancing" their teaching. They liked the "structure" of the documents and the "focused" teaching approaches, including a focus on individual children.

For most principals and staff the issue was not whether they accepted the philosophy behind the documents but how to cope with the workload their implementation required, particularly within the set timeframes. The workload of teachers was already such that they could be put off attempting to come to grips with something they may agree with because of the extra work involved. A particular point at issue was the amount of time that teachers believed had to be spent on evaluation and assessment if the documents were to be fully implemented. Was there going to be enough time left to teach? (For further comments on assessment, *see* p. 45)

## The Relationships Between the Various Documents

### Range of Opinions

When principals and teachers were asked if they (and their staff) saw any clear relationships between the various policy documents, none linked the curriculum statements to the National Education Guidelines, including the National Education Goals, although most saw relationships between the various curriculum statements. As with all questions to do with the New Zealand Curriculum, the principals' responses to questions on this topic depended on their familiarity with the documents in

the first place, as well as their knowledge of their staff's views. The principals' responses were also influenced by how closely the staff was adhering to the Ministry's implementation timeline. For example, the principal of the school where staff were not focusing on implementing the New Zealand Curriculum did not think staff saw any relationship between the various documents. The most cynical teacher thought the curriculum reforms were politically motivated and the relationship between the documents was that they were all "the bright idea of the Minister and the subjects have all been forced into the timeframe to suit him".

It is likely that teachers who were most conversant with the *New Zealand Curriculum Framework* were most likely to see relationships between the various curriculum statements. In this document the 7 essential learning areas and the 8 essential skills are set out and these are illustrated in more detail in individual curriculum statements. This was certainly the view of a Grade 2 principal, for example, who referred to the *New Zealand Curriculum Framework* as the key document which sets out the philosophy behind the other curriculum statements. The *New Zealand Curriculum Framework* was well received by his staff. A Grade 5 principal, on the other hand, thought his staff taught separate subjects and he did not think they were familiar with "the spirit" of the *New Zealand Curriculum Framework* and the relationship between the skills set out in that document and those focused on in the various curriculum statements.

### Growing Awareness

It was a common view of principals that the more teachers used existing documents and the more new documents came on stream, the more teachers became aware of relationships between the documents. This was also the view of the teachers themselves. The use of learning strands and levels of achievement was the most commonly referred to similarity between various curriculum statements. Achievement objectives and assessment activities also characterised the various curriculum statements. The objectives themselves focused on skills common to all curriculum areas. One or two teachers stressed the importance of the documents being planned for the total school system from the junior levels of the primary school to the senior secondary school.

Individual teachers referred to more complex relationships. For example, the sole-charge teaching principal said initially she looked at the curriculum statements separately, starting with mathematics. She later moved on to science and English and in the process discovered links, for example, close reading and transactional reading in science which had also been presented in English. She now sees links between English, science, and social studies and has devised an English overview sheet that goes in with the school's science and social studies statements.

## Summary

The way the principal interpreted his or her responsibility with regard to implementing the New Zealand Curriculum had a major impact on what was happening in each of the case-study schools. Principals who were also classroom teachers were likely to be more actively involved in curriculum implementation than non-teaching principals, who tended to delegate prime responsibility for curriculum implementation to senior teaching staff. Most principals were attempting to follow the Ministry of Education's timeline for curriculum implementation. However, one principal who felt her main responsibility in curriculum was to focus on the learning needs of the children in her school, was not attempting to do so.

The most common and effective way by which teachers were introduced to the curriculum statements was through teacher-development contracts. Various factors contributed to teachers' familiarity with the curriculum statements including the extent to which documents were used for planning at the school or syndicate level. More recently trained teachers were sometimes more conversant with the documents than longer-serving teachers. Principals and teachers were likely to support the philosophy on which the statements were based. Teachers were much less likely to be familiar with the *National Education Guidelines* (which they regarded as the responsibility of principals and boards of trustees) than they were with the curriculum statements. Two principals had also only recently become familiar with these guidelines in conjunction with a visit from the Education Review Office.

# PLANNING AND MONITORING PROCESSES AT THE SCHOOL AND CLASSROOM LEVEL

Boards of trustees, through their principal and staff, are required to document how the *National Education Guidelines* (which include the curriculum statements) are being implemented and to maintain an ongoing programme of self-review.[6] We asked the principals and teachers a series of questions about the planning and monitoring processes in their school.

## Strategic Planning and School Development Plans

Schools varied as to the kind and amount of planning undertaken at the school-wide level. Few schools had made much progress in strategic planning although most had a school development plan, or at least a collection of policy documents akin to the old school schemes. One principal acknowledged that although staff knew "which track they were trying to go down" as far as planning was concerned, the school did not yet have either a strategic or a school development plan. For one thing, he did not see how a long-term plan for curriculum implementation could be developed when staff had no idea how long it was going to take to implement each curriculum statement.

A second principal commented:

> [The strategic plan] was another thing ERO asked us about. We're working on it. We haven't done a self-review which was another thing ERO criticised us for. So we are in the process of doing that. We hope from the self-review information to start to look at a strategic development plan because there isn't an overall view. We sort of know where we're going but it hasn't been stated.

### Lack of Clear Guidelines: Variations in Terminology

At the time of the interviews there appeared to be no clear guidelines for principals as to what school-wide planning was appropriate and expected. There was also confusion about terminology - not all teachers were familiar with "the new words which kept coming". The labels used to describe the range of planning processes within schools varied, and it was not always clear what the distinguishing features of the various terms were. One principal described her understanding as:

> The way I see it, the top of it is the charter. Then you have the curriculum framework and the NEGs and the NAGs. Then you've got your strategic plan which covers 4 or 5 years, or whatever you want to do it by. The school development plan covers everything - property, fund-raising, and so on - that's the old school scheme. The strategic plan is for each curriculum area - where you want to be in X number of years' time, and for each area in the school development plan. Some people call it an implementation plan. I've put the planning and preparation, the programme, the policy, and the strategic plan in a folder and

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[6] See *National Education Guidelines: A three-part set of requirements*. The *Education Gazette*, 15 June, 1993.

called it the curriculum programme. That contains the lot.

A further explanation for the variation in the responses of principals may be in their differing perceptions of the value of strategic planning. At least two gave the impression that if the school did produce a strategic plan it would not be because they were committed to strategic planning as a useful tool, but because they understood they were required to develop a strategic plan, although as one put it, "To date there's certainly been no decree, 'Thou shall do it'".

Since the interviews have been completed the Education Review Office has published a National Education Evaluation Report (1995d) *Managing Future Uncertainty*, designed to assist boards of trustees to be strategic planners. This booklet should also help principals and staff to a clearer understanding of planning and monitoring processes. Included is a helpful description of the distinguishing features of school development and strategic learning:

> In New Zealand school development plans usually focus on the immediate future. In the current curriculum and assessment environment this focus often appropriately reflects the cycle of introduction of new national curriculum statements and associated assessment approaches. A number of schools are producing school development plans that contain elements of strategic planning and the incidence of this appears to be growing. A school development plan should not however, be regarded as a substitute for a strategic plan. Rather, it should be regarded as a separate element of the planning and development process that is consistent with and clearly linked to the strategic plan. (p. 6)

**How Principals Decided What Planning was Appropriate**

Principals indicated a range of ways by which they had become familiar with planning processes. These included:

- *Requirements of the Education Review Office*

An anticipated or actual visit from the Education Review Office frequently acted as a trigger for the school to clarify its planning processes. When one principal was asked if the school had a strategic plan he responded:

> Well, we will have now, because ERO said, 'Combine this document and this document and call it a strategic plan' . . . We've got an overview document and we used to have a school development plan but now we can call it a strategic plan.

Schools were divided in their views about the impact of the Education Review Office visits on the school's policies and forward planning. Most were critical, feeling strongly that the Education Review Office placed too much weight on planning documents and records, and put too much pressure on schools to comply. An exception was a school which had recently had a positive Education Review Office report and found the visit helpful. This principal commented:

> Education Review Office's suggestion was to have a manageable plan - not to expect to do everything in 5 minutes, which is quite a healthy change. I think that's why we've felt really positive about our ERO visits because while they've identified areas that need to be looked at, they've also been quite realistic and said that it's best to take small steps with bite-sized chunks. It may mean you get a non-compliance at the end, but we are determined that all the work we put in is worthwhile.

A second principal, who had been in his school for a number of years, said that the school had not had "extensive" school plans in the past. They only did so now because it was a "requirement of ERO", which he "supposes is helpful". He linked the requirement for school plans to the school reforms and said that the changes brought about by "Tomorrow's Schools" had been onerous, and schools were only just "coming to grips" with their responsibilities for planning and school policies. Whereas previously the now disestablished education boards had looked after property, and the Department of Education had taken responsibility for the curriculum, these responsibilities had fallen to individual schools. He emphasised that although in theory such responsibilities rested with boards of trustees, the reality was that school principals carried most of the burden.

- *Local Meetings*

One principal commented:

> I go along to these principals' days and they talk about strategic plans and implementation plans and curriculum programmes - there are so many different terms for things. I would like something that says: 'You have to do this. Here are the policies you should have.' I've worked on curriculum programmes for the 4 new documents, but I'm not going to do one on health until health comes out, because I can't see the sense of doing one when it's going to change.

This same principal commented on the value of rural principals' days, particularly in the absence of a handbook for principals. These meetings were particularly important for a new principal. As one recently appointed rural principal said:

> I knew how to teach, but I've been in schools in town where the principal sits in his office and you don't really know what he does. Suddenly I had that role and I didn't know what was expected.

- *Use of Advisers*

Rural advisers, for example, appear to have done a good job on management for country schools, helping with getting systems up and going, including the use of flow charts. This assistance has taken pressure off some principals.

- *Use of Guides*

One example was the set of 5 booklets issued to schools at the time of the introduction of the school reforms. As one principal said:

> At the time I think they were seen by a lot of schools as just another pile of documents, but they're actually quite user-friendly and very valuable little documents. They cover finance, personnel, property, governance, and management. They included a school plan, or an idea of the track you wanted the school to go down.

- *Voluntary Courses of Study*

An example would be Advanced Studies for Teachers courses which include finances and management.

**The Teachers' Views**

Lack of clarity about the need for strategic planning on the part of some principals may have contributed to the confused picture which emerged from the teachers' responses to the question, *"Is there a strategic plan or a school development plan for the school?"*

The teachers were divided about equally between those who had no doubt that there was a school strategic and/or development plan (and that the school adhered to it), and those who were either unclear what was meant by the question or made comments such as "There may well be but I've never seen one, I don't know really much about it"; "I honestly don't know"; or "I wouldn't have a clue". (These latter 2 teachers were relatively new to the school.)

A number of teachers also echoed the attitude of one or two principals who gave the impression that strategic planning was something that was done because they were required to do so, rather than because of a commitment to strategic planning. One teacher, for example, who said she was not aware of any strategic or school development plan, explained that the lack of knowledge might be because ". . . the last two principals have been very kind and protected us from much of the paper work that's been dumped on us. So there may be one but he hasn't bothered us with it." This same teacher went on to say that if there was a school development plan the various curriculum statements could not be expected to relate to it because they were "an imposition". As teachers just had "to do what they [the curriculum statements] said", they could not really be fitted into an existing school plan.

A beginning teacher thought her lack of knowledge of strategic planning within the school was probably because other staff attempted to protect her:

> . . . it might be that senior management may have actively chosen not to tell me because I am beginning and the major focus for me is that (a) I manage my programme, and (b) keep sane. So maybe some of that might not have been passed down because they're not wanting to overload me on the job.

Two or three other teachers indicated that they were not consulted about overall school planning.

> School scheme - I don't know about that secrecy! It's a senior staff thing. They don't let the Scale A know anything! I stick to my goals for the children in my room - that's my focus.

Comments such as this must raise questions about the likelihood of individual teachers being committed to the school strategic or development plans where they existed. Another teacher, for example, who knew there was a school development plan acknowledged that she "didn't know incredibly much about it".

**Review of School Strategic and/or Development Plan**

Most principals said they were able to adhere to their strategic or school development plan (or their collection of policy documents) and that these were subject to regular review, although few were specific about the procedures by which this was done. The following are examples of the kind of comments principals made when they elaborated on the ways by which development plans or policy documents were kept up to date.

- At one school staff were reviewing selected school policies relating to a number of topics including: parent education, board of trustees education, and professional development - ". . .

the whole mishmash of what it takes to run the school".

- In a second school the development plan had to be constantly revised as staff realised insufficient resources had been allocated to particular areas, for example, computers, and staff development.
- In a third school, individual teachers who had responsibility for particular curriculum areas were also responsible for keeping their section of the school policy document up to date.
- One rural principal who believed she adhered closely to her strategic plan which she considered to be "a living document" said the plan goes to the whole community who are free to comment on it.

**The School Development Plan and the Curriculum**

Curriculum was an important part of the school development plan in all schools but the implementation of the New Zealand Curriculum was more central to some than others. Several principals spoke of the school development plan and curriculum implementation as though they were one and the same thing. Teachers frequently did the same. (This may have been because of the focus of our interviews.) One principal commented:

> Curriculum is the major part of our planning. I don't know whether you would call it a strategic plan. We just call it our training plan for now.

In most schools the key area or areas for curriculum development and resource allocation in the current year were determined by the Ministry of Education's timeline for the implementation of the New Zealand Curriculum and staff participation in related teacher-development contracts.

One teacher described a process she had been part of at her previous school where a group of teachers in a district met with a facilitator to look at the *New Zealand Curriculum Framework* and develop a school plan. The aim of the group was to bring about change. Several models were developed and the staff at the previous school trialled a model in the process of implementing the first curriculum statement, and a school plan was developed.

In one of the schools which was not focusing on implementing the New Zealand Curriculum according to the Ministry's timeline, the principal emphasised that the school plan was very much a curriculum document. Each whanau/syndicate was required to review their programmes along with gathering data about their students. On the basis of these data students' learning needs were ranked and these then became the basis of the school plan. The three areas identified for 1995 were written language, physical education, and tikanga Maori. The school budget and teacher-development programmes reflected the emphasis placed on these 3 curriculum areas.

All schools held staff meetings, a varying proportion of which were professional meetings devoted to overall school planning or curriculum topics. A common pattern was to alternate administrative and professional meetings.

It was also a common pattern, particularly in larger schools, for syndicates to have the responsibility for the detailed planning for curriculum implementation. Usually this was within the framework of a school development plan, although in one large school where a teacher said "There are no major school-wide 'focuses'", syndicates appeared to operate independently of each other.

Staff who had attended teacher-development courses in particular curriculum areas frequently played a leadership role in planning for curriculum implementation. In larger schools small groups

of staff with a curriculum responsibility in a particular area might meet in cluster groups, perhaps also attended by syndicate representatives. In one school at least these meetings did not follow a set timetable but depended on the initiative of individual teachers calling a meeting.

Two or three teachers gave examples where the leadership for the development of a school development plan in an individual curriculum area had come from an external facilitator responsible for a teacher-development contract in, for example, English or technology, rather than the principal.

**Forward Planning for Curriculum Development**

We asked the principals and teachers how far ahead they could plan realistically for curriculum development. At the school-wide level the range was from a year to 2 or 3 years. One principal, for example, who thought 2 years was about as far ahead as one could be expected to plan effectively, recognised that the ministry, through its timelines for curriculum implementation, was looking ahead further than that. He said that the issue of forward planning was discussed at a recent principals' meeting and although some were talking about the merits of strategic plans that looked ahead for 5 years he thought ". . . you'd have to be nuts to go down that track". He said that you only had to realise how impossible it would have been 5 years ago to predict where schools would be this year, to realise that effective planning over that time span was impossible.

The assistant principal from a second school said that this year staff were planning to work on English, science, and technology statements, but further ahead than that "We're more likely to just vaguely think we might do that next year".

At the classroom level, individual teachers or syndicates might have an overview of a year's programme, or a 2-year cycle in some areas of the school, for example, junior school, or for some subjects. However, planning was more likely to be on a term-by-term basis, broken up into shorter monthly, weekly, or even daily segments, or a combination of all three. One teacher said, for example, that he did a planning overview of what he wanted children to achieve for perhaps 6 weeks, and then prepared a daily plan from that. A common view was that teachers needed to be flexible, and long-term planning was limited by not knowing how long it was going to take children to master objectives. Several teachers suggested that it would be easier to plan for longer periods of time when all the documents were in place and staff were thoroughly conversant with them.

*Need for Flexibility*

All principals would probably advocate the need for flexibility in long-term planning.[7] Flexibility was emphasised by one principal who said that if planning was based on the needs of pupils as it was in her school, it was not possible to plan too far into the future because pupils' needs might change. This school had a regular pattern of school reviews and at any one point in time they had an idea of where their next priority should be, but the principal would certainly not want to commit a plan to paper for, say, the next 3 years because within that time the focus might well need to change.

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[7] Flexibility is emphasised as a key element in strategic planning in the Education Review Office Publication (1995d) *Managing Future Uncertainty*: "The notion of flexibility is an important one. A strategic plan is about dealing with future uncertainty. It should not, therefore, be a rigid prescriptive document, but one that provides guidance and enables adaptability." (p. 3)

*Variation According to Curriculum Area*

There might be a variation within a school in the timespan of forward planning according to curriculum area. For example in one school mathematics was planned for a year in advance, but social studies and science had a 2-3 year plan. In one school where teachers had recently started working on a teacher-development contract in technology, a 5-year strategic plan for the school was going to be developed. The leadership was coming from those engaged in the contract.

*Time Available for Planning*

The amount of time it takes to plan effectively was a problem for teachers. Teachers spoke of the time needed for individual classroom planning compounded by planning at the syndicate and school level. It was common for teachers to feel under pressure because of the number of planning meetings they were required to attend. In the words of one teacher:

> Time is a big factor. Already I have meetings on 3 days a week. One is a senior staff meeting, one a staff meeting. Every second one is meant to be curriculum development but we end up doing an awful lot of administration. We have syndicate meetings when we are trying to plan together. All staff are involved in at least 2 meetings.

Time can also be a particular problem for teaching principals. They do get release time, but a day a week, for example, does not go far when they are responsible for managing the school as well as for curriculum-development planning at the school and classroom level.

**Monitoring the Implementation of the New Zealand Curriculum**

This was probably the area where least progress had been made in the schools we visited. Even in the schools which had the most clearly developed plans for implementing the New Zealand Curriculum, clear guidelines had rarely been developed for monitoring curriculum implementation.

*Haphazard Progress*

Principals described various systems for monitoring curriculum implementation but we had no means of judging how consistent or effective they were. For example, one principal who said his senior staff were "planning, evaluating and monitoring with their teams all the time", also acknowledged that in terms of implementing the New Zealand Curriculum they were only "making very tentative moves" and were only "venturing into the water in terms of curriculum change". This school's system of monitoring progress in the various curriculum areas was based on 6-monthly class reviews which were collated and edited at the syndicate level and then formed the basis of a full school review.

A second principal who described his responsibility as " . . . to ensure that teachers have a balanced programme operating, that they're teaching as well as they are able to, and that children's learning is reasonably effective", acknowledged that internal systems for monitoring that these things were occurring were not yet in place. He was confident that the levels of achievement of the pupils in the school were high, but he based this on external indicators, for example, their performance in Australian mathematics tests and their subsequent achievement at secondary school.

A third principal, who placed great emphasis on planning, was initially unsure how she could judge whether or not the New Zealand Curriculum had been effectively implemented, but then decided that if the implementation was carefully planned and a check was made that all intended topics had been covered it could be assumed that the curriculum had been implemented. It was an article of faith with



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her that "comprehensive planning leads to improvement with children".

The principal who appeared most confident that there was a system in place in the school to review the process of curriculum implementation said it was managed through the teacher appraisal system which this year was focused on mathematics. As the appraisal system was closely linked to implementing the curriculum statements by monitoring that teachers had taken the ideas on board and were using the appropriate equipment, it also ensured that the curriculum was being implemented. Monitoring was done at various levels - through the appraisal system at the syndicate level using evaluation sheets, and through individual teachers with a responsibility for a curriculum area checking that staff had the resources they needed and agreed-upon plans were carried out.

A teacher from this school commented on how helpful the teacher appraisal system was to her. She said she worked more effectively if she knew ". . . that someone else was going to be sharing or looking at my work because it makes me think what I'm putting on paper". Another staff member said the system worked well because of the good staff atmosphere:

> People tend to work together pretty well and I think that helps because when you've got other people coming in to assess you if you know them well and they know you, you know they're going to be objective and fair - they're going to work in a supportive way.

When teachers were asked if there were any systems in place at the school-wide level to monitor and evaluate the implementation of the New Zealand Curriculum, they tended to respond by describing school, syndicate, or class systems for assessing children and monitoring pupil progress.

> Pass. I really don't know. I know from the school I was in before there were people there who hadn't even opened the documents and nobody worried too much. Here, I work closely with my syndicate and we are all using the documents when we are planning together so I know that they are attempting to use them but as far as the rest of the school is concerned I wouldn't have a clue.

Others teachers gave accounts of how their classroom planning was checked by senior teachers in their syndicate to see that teachers were planning and teaching to curriculum objectives, who then passed their plans on to the principal.

One assistant principal said she did a lot of monitoring of children's work but it was not specifically designed to monitor the implementation of the New Zealand Curriculum. She described her monitoring as:

> Just the usual senior staff supervision of what teachers are doing, but I'm not really monitoring what they're doing according to whether they're implementing the English curriculum as such. I just monitor what they're doing and whether I think it's appropriate and the children's work standard is good. I'm really only monitoring it from my own perception of standards of work and the appropriateness of the programme. I'm not monitoring to see they've covered particular objectives in English.

The pace of change was one explanation given by teachers for schools not being able to monitor how effectively the curriculum was being implemented. In the words of one teacher:

> Everything's new. You don't get a lot of time to reflect and that's what we need to do in science. We need to take time out and reflect and see just how successful the implementation in '92 and '93 was. People say they are confident, but talking to ERO and just looking around I'm not sure.

In the school whose curriculum focus was based on children's needs rather than the New Zealand Curriculum, the principal faced staff resistance to having their work monitored. This was particularly the case for longer-serving teachers. As the principal commented:

> Last year we tried a system where staff members had individual conferences with their middle managers after the middle manager had gone in and observed briefly in the classroom. Data gathering took place twice a term. Staff had to present samples of children's work as well as monitoring notes. The staff in one whanau found other staff going in fairly threatening, so this year I've withdrawn from that because I don't want to create ill-feeling. To have true change you have to have everyone on board so I have stepped back a bit. They're still going on with data gathering. It's been great having the first-years because they expect that sort of thing will happen whereas to some of the older staff it was quite earth-shattering. They have to realise that as a professional you have ongoing development. Just because you've been teaching in a school for X number of years doesn't mean that's fine what you are doing. We're constantly seeking to change and develop our teaching.

In this same school not all staff were in total agreement with the decision to concentrate on the children's perceived needs rather than the Ministry timeline for curriculum implementation. One at least would have liked more focus on the curriculum statements although she thought that much of what teachers were doing in writing, for example, matched the English statement and that the outcomes would not be too different. She certainly supported the view that the way the school was working was more likely to bring about change than to have "change imposed from the top".

In the second school where little attempt was being made to follow the ministry's timeline for curriculum implementation, there appeared to be no clear policy for monitoring curriculum change. One teacher compared her experience with that of her previous school where:

> We used to have it [the timeline] hanging on the wall and we'd scowl at it every so often, but it was a constant reminder.

*Responsibilities of Resource Teachers*

In schools where teachers acted as a resource person for a particular curriculum area they might also be responsible for evaluating the delivery of the curriculum area for which they were responsible. In one school which was following this procedure staff agreed on the recording systems and assessment procedures to be used for each curriculum area and these were included in the long-term plan for the following year. In the principal's view the system worked well because there were only 6 classrooms in the school and it was easy for everyone to keep in touch with what was going on in other classrooms. In a second school a system had also just been set up whereby resource teachers in mathematics and science were responsible for looking at teachers' planning to ascertain whether or not curriculum objectives were being met. They have recently been given release time for this responsibility.

## Summary

Boards of trustees, through their principal and staff, are required to document how the *National Education Guidelines* (which include the curriculum statements) are being implemented, and maintain an ongoing programme of self-review. Few schools had made much progress in strategic planning

although most had a school development plan, or at least a collection of policy documents akin to the old school schemes. At the time of the interviews there appeared to be no clear guidelines for principals as to what school-wide planning was appropriate and expected. There was also confusion about terminology. An anticipated or actual visit from the Education Review Office frequently acted as a trigger for the school to clarify its planning processes. Most principals thought that 2 or 3 years was as far ahead as the could plan realistically for curriculum development. All stressed the need for flexibility. Even in the schools which had the most clearly developed plans for implementing the New Zealand Curriculum, clear guidelines had rarely been developed for monitoring curriculum implementation.

# CHANGE AND THE NEW ZEALAND CURRICULUM

We assumed that implementing the New Zealand Curriculum was about managing change. We asked principals and teachers how much change they thought was involved in implementing the *New Zealand Curriculum Framework* and associated statements.

## The Principals' Views

It was a common perception of principals that there was less change involved than was at first thought by the introduction of a "new" curriculum. As one put it:

> Part of the initial flurry with these [curriculum statements] is that people think they're some revolutionary departure from the past but in fact with the mathematics one in particular, with which I'm most familiar, although there are some basic changes in expectations, it's not an earth-shaking change.

Another talked of "the biggest change is one of labels, being familiar with the terminology and the strands". Or as another teaching principal put it:

> It hasn't changed my teaching style. It hasn't changed the way I think about science and social studies, for example. It's got some new words which I've had to look up in glossaries to see what I'm doing . . . but it hasn't changed the way I teach at all because I think I was teaching that way anyway in terms of planning, assessment, and evaluation . . . I like to be able to go to the documents and look for examples of what kids need.

For one principal the greatest change was the impact the curriculum statements were having on the total teaching programme of the school in terms of "binding staff together" because of a common focus within curriculum areas supported by whole-school development.

Finally, one principal thought there were:

> . . . conceptual and philosophical changes, working away from pure knowledge and fact - changes that focus on individual children, rather than groups.

Perhaps a surprising comment, given the generally accepted view of primary schools as having an individual, child-centred approach to teaching and learning.[8]

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[8] The view of principals that the curriculum change was less than they had expected probably confirms findings of Wylie (1994). In her 1993 survey, aimed at discovering what changes had occurred at schools since "Tomorrow's Schools" reforms, she wrote: "Forty percent of the principals responding said that the new Curriculum Framework would enhance particular curriculum emphases which had been initiated at their school since 1989, 31% that they might have to alter some of what had been initiated, and 2% that they might have to drop what they had indicated. These figures indicate that school curriculum development under school-based management has not involved a great

## The Teachers' Views

### Curriculum Content

Staff from all schools and at all levels agreed that the content of the curriculum statements with which they were familiar was not very different from what they were currently teaching, although the content was more broadly based than the previous curriculum. The main change was in the way content was organised. Staff mentioned the introduction of strands and levels and a return, according to one who had been teaching for 25 years, to a thematic approach. Nearly all teachers thought that the documents affected the planning of their teaching much more than its content.

Most staff were positive about the content of the curriculum statements. The way the curriculum statements were organised meant there were clearer guidelines. The mathematics curriculum was described as "more detailed", "more balanced" and "better co-ordinated" than the previous curriculum. Staff liked the practical, problem-solving approach incorporated in the documents which enabled children to focus on "everyday life all the time, rather than on equations". Two comments, one about English, and the second about science, typified teachers' reaction:

> It made me focus on what I'm teaching and made me aware that I may be focusing too much on written language. It clarified that for me, so that's a positive.

> At the senior level, science has gone away from the chemical reaction type of things to much more hands on. It's far more practical. You can do things in the kitchen with the kids which used to be frowned on by the men.

Uncertainty was expressed by 2 technicraft teachers that the draft technology curriculum focused on the design aspects of technology while their focus was on practical skills. They thought that the draft document lacked specific guidelines and that there had been insufficient consultation with technicraft teachers who were anxious to know how the transition from the present to the new curriculum would take place. Technicraft teachers in primary schools were currently working on a Form I to IV syllabus. They would appreciate clarification of what their role would be under the proposed curriculum.

### Teaching Approaches

Teachers agreed that the greatest impact of the curriculum statements was on their approaches to teaching. The impact was in 2 areas: how teachers planned their programmes of work and the style in which they delivered them. Many teachers said they spent more time planning units to tie in with specific objectives. Most believed this helped them clarify what they were aiming to achieve, and then to assess the results more effectively. A typical comment was:

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deal of radical departure from current practice in most schools - and also, that the new framework is not a radical departure from this practice." (p.117) She concluded that: "The survey results show scant sign of radical change in curriculum and assessment". (p. 121)

> It's a process of going from an objective to what are your skills, knowledge, and outcomes. These come through clearly and primary teachers were ready for that from a planning point of view.

A majority of teachers commented on the shift to a problem-solving approach. Some said they were already teaching this way and felt reinforced in their teaching style. Others acknowledged that they now involved the children more in decision making and evaluation as well as asking them to think and write their own ideas more when working on units. They thought the documents encouraged a more flexible and experimental approach to teaching. One described her enthusiasm about the options suggested by the English document:

> I think it's a more exciting approach. At the weekend I spent time videoing commercials for a new entrant class, so they could look at them from the visual side. I don't think I would ever have thought about doing that for new entrants. Maybe with older children.

Some thought that, given sufficient time, they could develop excellent units with an appropriate evaluation procedure to show what they were achieving. However, the demands of coming to terms with the documents and the need to teach in a range of major curriculum areas prevented that at present.

### The Level of the School

Most teachers who commented on whether the amount of change involved in implementing the curriculum statements varied according to the level of the school thought the amount of change was similar across the primary school and in most cases amounted to "minor adjustments at all levels". The exception were 7 teachers who thought the change was greater for teachers at the senior level, both because senior level teachers had to be "knowledgeable in a lot of areas" and because they may be now taking on board teaching approaches that were already commonplace in junior classes.

### Amount Taught

Very few teachers commented on whether or not they were teaching more or less of any subject as a result of the new curriculum statements. One teacher was unsure how all curriculum areas could be covered, particularly when technology was introduced. A principal thought there was less time to teach "the basics" because of the demands of the social studies curriculum which dealt with such topics as the environment, people, and relationships. An assistant principal thought she was teaching more science because "you try to bring it into everything you do, whereas before you used to say, 'I'm going to teach this' and you just did it".

## The Impact of the New Zealand Curriculum on Children's Learning

Principals and teachers were asked to comment on the effect they thought the New Zealand Curriculum would have on children's learning. Teachers were divided in their views on whether or not the curriculum changes would affect learning outcomes. Some thought it was too early to tell; others thought the changes were not sufficiently significant to affect learning outcomes. If principals thought there would be an impact on children's learning, it was more that they hoped there would be, than that they had any evidence that there had been any to date. As one principal put it:

> From the teachers' point of view we would like to think that all the work we're doing is having some impression on the kids because that's what it's all about.

However, a majority of teachers thought that the curriculum had the potential to produce children who had more problem-solving skills, were able to think for themselves, and take more responsibility for their own learning. Several commented on the potential for children to succeed at their own level which was more likely to encourage them to continue learning.

Teachers identified a number of ways in which this was likely to be achieved: through more specific objectives, clear planning, thorough assessment, and an ability to focus on practical applications that will make learning more "real" to students.

The positive attitude of teachers can be summarised in the following comment:

> We're talking about specific targets, specific goals and they're not rigidly related to specific times. We are saying there are steps and processes that children go through. The focus seems to be getting children to become lifelong learners and become self-motivated to learn and inquiring themselves. I think that's really good because before we used to ask children questions and ask them to answer the questions they hadn't asked. Now we're starting to say, let children investigate more, get them to answer their own questions.

A small number of teachers did not think that the New Zealand Curriculum would necessarily bring about significant changes in children's learning. Most of these teachers were in schools which had made less progress in implementing the curriculum documents. Half of them argued that the curriculum would not make a difference because they were already encouraging children to think for themselves and had a focus on individual learning. The remainder thought the curriculum documents did not bring anything new to their teaching or were flawed. One commented:

> With the mathematics one I've got a grave concern that people have taken some aspects like problem-solving and thrown out many other aspects of a balanced mathematics programme. In fact, some [students] may be worse off. I don't think the others are going to have an earth-shattering change in schools.

## Factors Which Helped in Implementing the New Zealand Curriculum

We asked teachers to identify 3 factors which helped the implementation of the New Zealand Curriculum in their school. The 3 factors mentioned most often by teachers were:

### 1. Training and Staff Development

Training and staff development were mentioned twice as often as anything else as a way of helping staff manage the implementation of the new curriculum. It was also important that support through teacher development should be ongoing.[9] (For a full discussion of this topic *see* p. 63.)

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[9] This concern of teachers has been reported on in earlier studies. Gilmore (1994), for example, reports that the lack of ongoing support was seen by teachers to be one of the least successful aspects of the teacher-development programmes in mathematics and science. (p. xiii)

## 2. Leadership and Collegial Support

A supportive principal and strong leadership from senior staff provided a positive climate in schools and, along with a sense of trust and mutual support between staff, made it easier to implement the curriculum.

Almost all staff interviewed agreed that the key elements of the principal's role were to:

- be supportive of staff,
- keep up to date personally,
- oversee the implementation of the curriculum,
- act as a link between staff and the board of trustees, and
- facilitate staff development.

Staff in the 4 schools which were following the Ministry of Education's timeline for implementing the curriculum (in addition to the sole-charge school) generally agreed that the principal was fulfilling these roles satisfactorily. They used terms such as: supportive and helpful; he keeps us on task; leads by example. One assistant principal, in commenting on the role played by the principal in her school, said:

> [It's] being supportive, particularly of those who are on contract, ensuring the path's smooth, the time is made available and the requirements for relievers are met. He knows the timetable for us for the remainder of the year. Even just coming along to staff meetings when the DP and I are presenting. Everybody comes, not just the classroom teacher.

In a school where the principal was not teaching, staff placed more emphasis on his role as a link between senior staff and the board and as a personal support for staff. Some were ambivalent about his distance from the process.

> He's got to know what it's all about and be up to date. Because he's not teaching, he feels strongly that it's becoming more and more a senior management responsibility. If he's not teaching, how can he talk about practical things and be honest and say, 'I find this successful in English and mathematics' and so on.
>
> He realises more and more it's the AP, the DP, and the senior teachers who take responsibility and leadership for that.

Staff in the largest schools were glad they had non-teaching principals. They believed that this gave their principals time to focus on teacher development and meant the principals were more available to staff. We were not in a position to ascertain that this in fact happened. However, a non-teaching principal in a medium-sized school attended all curriculum development meetings so that he went through a similar process as his staff.

In 2 schools with teaching principals, staff thought their principal led by example as well as overseeing curriculum implementation by facilitating staff training and negotiating with the board of trustees. The teaching principals themselves liked the fact that they were actively involved in the curriculum implementation process and did not ask teachers to do what they did not also do in the classroom.

In the 2 schools which were not actively implementing the curriculum in a co-ordinated fashion, staff agreed that the principal should provide leadership as well as time for courses, resources, and encouragement. They also agreed that this was not happening in their school in relation to the curriculum. Several defended the approach being taken in the school or, for other unspecified reasons, were reluctant to criticise the way the school was approaching the curriculum. One teacher's comment sums up the views of this group:

> The principal should see that we're all actually doing it. I've heard one or two people say, 'What is the curriculum framework?' I think they're frightened by the words. They think it must be something terrible. It's not happening here enough, it could be more.

Principals and teachers described the need for a climate of trust. Others discussed the value of having someone "to bounce ideas off". One comment typifies teachers' views:

> [It helps] if there is a lot of enthusiasm within the school to implement these documents. Teachers supporting each other is a big one and here there is a very supportive group.

In all but one school, staff were enthusiastic about the level of collegiality in the school. Staff co-operated with and supported each other, sharing resources, and staff relationships were good. However, this co-operation was not necessarily directed towards implementing the New Zealand Curriculum.

In the largest school, although the camaraderie among staff was high, staff experienced difficulty in working together but this was changing. Co-operation within each syndicate was good and the staff as a whole were beginning to work together. One teacher commented:

> There's 2 of us that work co-operatively, no 3 now. We'd probably like to think we do and I think we are all willing to share but it's like you can take the horse to water but you can't make it drink. You can talk and share as much as you want but as soon as they get back into the classroom they can do what they want.

Not all schools had recently trained teachers on their staff but in at least 4 schools the contribution of less experienced staff was actively welcomed and longer-serving teachers made use of their more recent knowledge gained at colleges of education. In one school a first-year teacher was asked to help plan the year's science units because she "knew what she was talking about".

### 3. Attitudes

Teachers' attitudes were the third factor teachers thought would help ease the implementation of the curriculum. The positive attitudes of individual teachers and their professional skills were undoubtedly key factors in the progress schools were making towards implementing the New Zealand Curriculum. Being willing to accept the new curriculum and engage with the process made the change less stressful for teachers. As the sole charge teacher said:

> You either choose to get involved with it or you choose to ignore it. You can't make people go to courses or use the documents.

At least one teacher in every school commented on the importance of committed and enthusiastic teachers in implementing the curriculum.

Staff in 5 schools were committed to change. The level of commitment ranged from enthusiastic to accepting. One teacher nearing retirement acknowledged that she had less interest in curriculum change than younger teachers in the school whom she described as enthusiastic. A staff member in a small school was at the "accepting" end of the continuum of commitment:

> We all get down with it, we all feel with so much pressure a lot of it goes over our heads because we feel snowed under, but I would say generally we're accepting of it and taking it on board.

In 2 schools, teachers believed that while individual teachers were committed to curriculum change, others were resistant and the school as a whole was not committed to the process. The reasons for teachers' lack of commitment included resistance to change, lack of familiarity with the documents and lack of teacher development. The principal from 1 of these schools thought that if staff believed the documents were worthwhile they would become committed to them. However, the school was taking " a conservative approach" and evaluating what the changes were prior to implementing them.

A first-year teacher in a large school where little change was occurring, was positive about the curriculum. She thought that employing beginning teachers could be helpful because they could show teachers who were resistant to change that the documents were easy to work with.

### Other Helpful Factors Mentioned by Staff

Other factors which staff said helped them deal with the change included: having enough time to study and become familiar with the documents; using the documents in the classroom; and having appropriate classroom resources. Most of the teachers who had used the documents found they could fit their existing teaching methods into the new curriculum and so were less daunted by the changes.

## Factors Which Hindered in Implementing the New Zealand Curriculum

Teachers were also asked to identify factors which hindered in implementing the New Zealand Curriculum. The 3 most frequently mentioned were:

### 1. Attitudes

Staff were almost unanimous in their view that teacher resistance was the greatest obstacle to change. This view was expressed by principals and senior staff, teachers with long and medium service, and those who had only recently begun teaching. In most schools 2 or 3 staff members commented on teacher attitudes, with some emphasising teachers' unwillingness to change, and others teachers' fear of change. In one case, the lack of motivation to change went right through the school.

> Nobody's made the slightest effort to inculcate [motivation] except for 1 or 2 young teachers who've been on a course and said, 'Look, this is not as horrible as it might be'. But everybody's too busy to listen to them.

Another teacher referred to teachers' reactions to individual documents as a way of characterising resistance to change:

> The English curriculum, for example, is so much on visual learning that maybe older teachers are more print-based. It's a different way of looking at things through new eyes. Maybe children are more visual learners than they used to be. We have to go with the flow and change our ideas of teaching.

**2. Time**

Teachers felt similarly strongly that lack of time was a hindrance to implementing the New Zealand Curriculum. Many linked lack of time with teacher resistance, commenting that if teachers had more time to attend courses, study the documents, and assemble resources, they would be less resistant to the requirement to implement the new curriculum. A teacher in a large school described the effect of trying to cope with her workload:

> My parents and my husband's parents get together in the supermarket and complain about how little they see me and I feel terrible about that but I just can't do the work in the time.

Others made similar comments detailing the hours they worked and their efforts to keep their lives in balance.

**3. Resources**

There appeared to be some confusion amongst principals as to how schools were expected to finance the implementation of the New Zealand Curriculum. A range of views was expressed by principals about the adequacy of the level of financial support received by schools, particularly for teacher development. Most principals accepted that it was over to the school to budget for teacher development which was usually a separate budget item. One of these principals commented:

> Funding isn't really a problem . . . The people are the issue.

However, 2 principals were frustrated by what they believed to be a change of policy with regard to funding for teacher-development contracts for curriculum implementation. The principal from the largest school had initially understood that all teacher release time (the most expensive budgetary item for teacher development) would be funded through the Ministry. He went on to say:

> With mathematics, and I think it's true of the others [curriculum contracts], we got only one release day when the contract entails each person in 3 days' work. So you're basically getting only 30 percent.

This principal was also concerned about the lack of money for classroom resources saying that the school had just spent $3,000 on equipment and textbooks for mathematics and that no extra funding had been available.

Two other principals referred to the "$700 that appeared in the mail for science". One of these thought his school was "so far behind [in terms of money] that it didn't matter". Staff managed because they spent money wisely.

One school hired extra aides and support people so that teachers could spend more time on matters relating to curriculum implementation, such as assessment.

*Resource Allocation Within the School*

All principals described a policy of targeting resources according to curriculum priorities within the school. For 5 of the 7 principals the curriculum priorities were in line with the Ministry timeline for implementing the New Zealand Curriculum. Decisions about resource allocation were often delegated to syndicates. In other schools, staff with responsibility for specific curriculum areas also identified resource shortages. Depending on the size of the school, budget proposals were either reviewed directly by the principal and then discussed with the board, or collated by syndicate leaders and reviewed by the principal and other senior staff before being discussed with the board.

Teachers in 5 out of 7 schools said they were hampered by a lack of suitable classroom resources in implementing particular curriculum areas. One described the difficulties her syndicate had experienced:

> With social studies we're planning units and things and having to work around what [resources] we've already got because there's not enough money in the kitty to get new ones. Mathematics is another one too. That's an ongoing one. We've seen the necessity to upgrade junior mathematics so we've had to put money into that one. It's got to be budgeted very carefully.

However, although all schools said they could use more resources, the level of funding for classroom resources was not usually a key issue in relation to implementing the curriculum. One principal did say that funding for teacher development and resources became an issue when there was pressure on the budget in other areas.

> It's the only area in the budget which is really negotiable. A lot of the other things are quite fixed - the caretaker's wages, cost of loo paper and things like power and energy. So when you start squeezing back, unfortunately curriculum is the one.

### Other Factors Mentioned by Staff

In addition to these 3 main factors, teachers in one school were concerned about the size of their classes while teachers in 2 schools commented on lack of leadership. Neither of these latter 2 schools was implementing the curriculum according to the Ministry's timetable.

## Other School Characteristics Which Might Affect the Implementation of the New Zealand Curriculum

### School Size

Staff in small and medium-sized schools appeared to have some advantages over those in larger schools. The main advantage was that it was easier for the whole staff to be involved in curriculum development and to be, as one put it, on the same wavelength. A teacher in a medium-sized school also described the advantages of being in a relatively small staff:

> I think our school is a good size because in our learning times we're in a circle and we can sit together. The people sharing the information can do activity-type sharing and because we have a terrific closeness here, I don't think anyone would be worried about saying, 'Hey, I don't understand this'.[10]

A teacher in the largest school thought the school was so big it was hard to get everyone on board with curriculum change.[11]

One of the drawbacks of smaller schools was that each teacher was usually responsible for 3 or 4 curriculum areas. Because of this, a number of teachers in smaller schools thought it would be easier for staff in bigger schools to spread the curriculum workload.

**Locality and Community**

Few teachers thought that locality had an effect on curriculum implementation in their school. Most teachers said they were able to get advice and attend courses as they needed. Staff in 2 rural schools thought it was a disadvantage being some distance from advisers although a teacher in a sole charge school felt quite comfortable ringing the rural adviser in her area.

Relatively few teachers commented on the influence the community might have in implementing the curriculum in their school. Teachers in the largest school described the community as supportive of the school but not involved in curriculum matters. Teachers in 2 other schools, one in a city suburb and one in a provincial town, said the school community did not really understand the curriculum changes and wanted the school to emphasise academic achievement. As one teacher put it:

> Community expectations don't necessarily match what's in the documents. They're very conservative, traditional. They are successful people who have succeeded in systems as they were. They don't know about what's happening and they don't necessarily want to know.

Others said that while their school made efforts to inform the community of curriculum changes, the community thought that implementing the curriculum was the school's job. Thus, lack of knowledge
and time and a perception that the curriculum is the responsibility of the professionals reduced community involvement. (*See also* "The Role of Boards of Trustees in Implementing the Curriculum" p. 73.)

**Staff Turnover**

Staff turnover can be both an advantage and a drawback. When trained staff leave, new staff may not have had training in particular areas which can be a problem both for the teacher and for the school. One teacher who had changed schools had missed out on training in the mathematics curriculum:

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[10] Ramsey *et al.* (1995) suggested that smaller schools compared with larger schools were more receptive to having outside facilitators to assist with curriculum implementation.

[11] This finding also supports evidence from earlier studies. Miller (1991), for example, reports that: "The size of the school appears to have a bearing on the achieving of the project's objectives. Larger schools appear to have experienced some difficulty in gaining support and involvement of all staff". (p. 8)

> Different schools are focusing on different curriculum areas. I've come to this school with what I consider to be a strength in science because of my experience of using the document and they are about to focus on science. They focused on mathematics last year and I haven't had that opportunity because the school I've come from is focusing on mathematics this year.

The principals of 2 schools thought their schools had benefited from recent staff turnover to replace staff who were resistant to change.

**Relieving Teachers**

For much of the year schools were able to find enough relieving teachers, but most schools experienced difficulty in obtaining relieving teachers when a course was being run in a particular district for teachers from several schools. This had been exacerbated by recent teacher shortages. The principal in at least one school worked out contract dates for the whole year and booked relieving teachers well in advance.

## Summary

It was a common perception of principals that there was less change involved than was at first thought by the introduction of a "new" curriculum. Teachers at all levels agreed that the content of the curriculum statements with which they were familiar was not very different from what they were currently teaching. The greatest impact of the curriculum statements was on how teachers planned their programmes of work and the style in which they delivered them. Teachers said they spent more time planning units to tie in with specific objectives. Most believed this helped them clarify what they were aiming to achieve, and then to assess the results more effectively. Most teachers were positive about the content of the curriculum statements.

Teachers were divided in their views on whether or not the curriculum changes would affect learning outcomes. Some thought it was too early to tell; others thought the changes were not sufficiently significant to affect learning outcomes. However, the majority of teachers thought that the curriculum had the potential to produce children who had more problem-solving skills, were able to think for themselves, and take more responsibility for their own learning.

The 3 factors which teachers identified as helping the implementation of the New Zealand Curriculum were: training and staff development; leadership and collegial support; and teachers' attitudes. Teachers' attitudes were also considered to be the most important factor likely to hinder curriculum implementation, along with insufficient time and resources.

# THE PERSONAL IMPACT ON TEACHERS OF IMPLEMENTING THE NEW ZEALAND CURRICULUM

We asked the teachers how they were coping with implementing the New Zealand Curriculum and how they felt about the pace of change. It was common for staff to be ambivalent about how well they were managing the curriculum changes. Teachers expressed views covering the full gamut from enthusiasm about the curriculum reforms and the reform process to anger. However, most said they were managing reasonably well, apart from one school where a majority of staff did not feel they were coping well with the demands of curriculum reform.

## Pace of Change

Teachers' views on the timeframe for implementing the curriculum fell into 3 groups:

### 1. Those Who Were Ambivalent About the Pace of Change

The largest group was ambivalent about the change. Several pointed out the need to balance time spent becoming familiar with the new curriculum with time spent managing the class on a daily basis. They wanted more time to reflect on individual documents. All were spending long hours meeting their teaching commitments and sought to balance their work and private lives. The following comment was typical:

> The pace of change is very intense. You have to learn to live with things never ever being done. You can work for 3 to 4 hours at night and then go to bed with a trigger of concern about something else on the list. I've tried meditation, soft music, anything. You have to manage the burden of unfinished work. I find the main thing is chatting to each other, being honest with each other about how it feels. It's such a relief.

In the 2 schools which were taking a less structured approach to implementing the New Zealand Curriculum, senior staff thought it was necessary to get teachers on side with the changes to reduce the incidence of staff resistance. However, in one of these schools, the slow pace of change increased the frustration of teachers who wanted to move faster than the pace adopted by the senior staff. Two comments from this school illustrate the different effects of this approach:

> If we said 'It's not done and we'd better hurry up and do it because we have to', I think we cancel out what we believe in, which is that you get everybody on board and going in the same direction. If you can get that through one curriculum area it makes it easier in the next. Time is not an issue. I just ignore it and there's nothing they can do. It doesn't matter what the Ministry says about charts - that's their problem.

> What does concern me is, say I wanted to move schools, that's where I feel panic because I haven't really had that experience, except what I've given myself. If I went to another school that was really on board I'd be floundering.

Another problem mentioned by several teachers was having to deal with more than one curriculum area at a time. They thought it would be easier for staff in secondary schools to introduce the curriculum because most secondary teachers only have to deal with one curriculum area at a time (although most would have to cope with pupils at more levels). Staff in 2 schools said they managed by slowing the pace of change, dealing with one area of change at a time, and by making only gradual changes in their planning and practice.

> It took me a while, I must admit, but now I refer to them [curriculum statements] all the time for different topics. It was a change but you just do it gradually. It's good to have something basic that you can refer to all the time instead of having nothing and saying, 'We have to do this topic, what do I look up?'.

**2. Those Who Thought the Documents Were Being Introduced Too Quickly**

The second group of teachers said that the pace of change was "too much, too fast, and too soon". Few added detailed comments. One who did said:

> They should have been put on our desks at staggered points in time. Once they've arrived, they become a pressure point. A document arrives before it is gazetted and has to be implemented. The in-service courses are also before it has to be implemented. Then there is the implementation date.

**3. Those Who Were Satisfied With the Pace of Change or Wanted the Documents Introduced Faster**

The third group was represented in 4 of the 7 schools and included a sole-charge principal, 3 teachers trained under the old curriculum, and 3 first-year teachers. In all these schools the New Zealand Curriculum was being actively implemented. The more experienced teachers held the view that it was better just to "get on and do it" rather than drag the process out over a long period. Teachers who had trained within the last 5 years were generally happy with the changes. The first-year teachers had trained under the new curriculum and did not like having to work under 2 systems at once.

The sole-charge principal had worked through each document as it came out:

> I haven't had a problem with the speed of change. The support's definitely there. You can ring up the people who run the courses at any time. I could send my documentation to the rural adviser and the person running the science contract to look at. I could have chosen to do nothing. It's up to the individual as to how much they get involved and do it.

The other teachers recognised the similarities between the documents and felt quite comfortable with them:

> The English draft was out for ages so you had time to get used to it; others just seem to turn up. I think it'll be good when they're all out. Basically they all run along the same routine and when they're all in, it will be a hell of a lot easier than having to switch from one to the other.

Some teachers were concerned about the pressures on young teachers who may be asked to do more than is reasonable given their pay and experience. One teacher, who has been teaching for more than 25 years, was disturbed about what was happening in her school:

> When I started teaching, the kind of work I'm doing now was done by principals. We have Scale A teachers being in charge of curriculum development areas and running things - on their pay!

## Is the Curriculum Reform Achievable?

The great majority of staff in 6 of the 7 schools believed that the curriculum reform was achievable, although some qualified their answers by saying this would take time and that support and training were needed. Others thought the curriculum reforms could be achieved, but at some cost.

> We'll do it but how many of us are going to burn out doing it and how many of us are really going to put our heart and soul into making changes when we've got so many to make.

Achieving curriculum reform is as much a process as an outcome. One teacher pointed out that reform can be achieved to different degrees. Her school had been working with the mathematics curriculum for over 2 years and still did not have all the required programmes in place before they needed to move on to the next curriculum area. Another teacher thought the greatest stumbling blocks to full achievement were assessment and evaluation.

> You feel that once something's taken and finished with it's over and you've got to turn round and look at it again and think about it. You put in all this work . . . making up little sheets and things for comments, but you wonder just how much it's actually used by another teacher when they change.

Teachers adopted a number of different strategies to manage the reforms in the classroom. One teacher, for example, had cut up the mathematics document into the levels that were appropriate for her class and kept these in clear files. She kept the remainder of the document handy for reference. Others dealt with one subject area at a time and put other curriculum documents aside.

## Increased Workloads

Most teachers commented on the effect of the curriculum changes on their workloads and all said that workloads had increased. Principals and senior staff referred to their own role as curriculum leaders and noted that any teacher in charge of a curriculum area that was currently the focus of change had an increased workload.

A number of teachers discussed the extra time it took them to become familiar with the documents and to try out new methods and resources in the classroom. They acknowledged that this was a passing phase and that once they became familiar with the documents the "donkey work" would decrease.

Several teachers noted that before "Tomorrow's Schools", resources used to be available through the Education Board - "they had bulk surplus and you just sent away". Now teachers themselves had to work out what the best options were which could involve dealing with numerous agencies and salespeople and checking out what resources were the best value.

Teachers also referred to the increase in paperwork associated with implementing the new documents, both in planning programmes and assessing outcomes.

Assessment accounted for a big increase in workload as teachers sought to work out efficient ways of assessing the effectiveness of their teaching. Some wondered how much value all the recording was when staff had no time to analyse the data they collected. One teacher in a junior syndicate was doing a 6-week review of her class.

> Even though you try and keep the data up to date it still seems to take ages. I counted and I had over 320 pieces of information with 29 children and all the different subjects. . . I can see the point but there must be some way of streamlining it. At times, especially at the end of the year, when you've done all this and the progress cards and the reports, everyone is just biting everybody's heads off. It just about causes marital break-ups and husbands are saying, 'What are you? You're just a teacher'.

Another teacher managed by limiting her work hours to 55 a week, except when the school had parent-teacher meetings. She decided her priorities on the basis of the benefit to her pupils.[12]

## Support for Staff

Senior teachers and first-year teachers in most schools had release time, the former for planning and observation purposes and the latter so they could observe in other classrooms.

Teachers in 2 schools thought it would be possible to arrange release time if they wanted to observe in other schools, while several senior teachers in a school in a provincial town had visited schools in the city to observe in classrooms.

> They decided they wanted to go and have a look at specific things in some schools. They put in a proposal to the principal and put down their objectives. I think that's one of the best sorts of staff development, seeing other teachers working.

## The Effect of External Requirements and Other Pressures

Teachers in 2 schools said parent expectations were an added pressure in implementing the curriculum. Several thought that parents needed more education on curriculum changes so they could support what teachers were doing.

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[12] A recent study on teacher workloads (Livingstone, 1994) confirms the increased pressure teachers feel themselves to be under in recent years: "Teachers' perceptions of their workloads were that they had been consistently and rapidly increasing over the last five years since 1989. Their copious and often trenchant verbatim comments gave a sense of a group of committed people under severe and mounting pressure.

"Areas which generated most stress for teachers were largely associated with the changes brought about by the *Tomorrow's Schools* reforms: the almost simultaneous implementation of many new curricula, and the over-rapid way in which this was being done; the avalanche of administrative paper work now descending upon them; the perceived pressure of reviews from the Educational Review Office; and the need to develop new assessment and appraisal systems." (Executive summary)

> Parents have a big impact because they are very aware of what their child is doing and not necessarily aware of the national curriculum. . . A lot of parents are making comments about what is going on in the room and when you actually show them what you have to teach to, they say 'Oh'.

The requirement to implement the "Tomorrow's Schools" reforms preceded the curriculum reforms but teachers were still coming to terms with the earlier structural changes. Teachers in 2 schools commented on the demands of reporting to boards of trustees and the community.

> I think the role of the board of trustees has taken a lot of time in the last 5 years as far as staff/board of trustee relationships go. Keeping parents informed, keeping the board of trustees informed because they change too.

Teachers in a medium-sized school referred to social pressures. They thought that some children had become more disruptive and therefore occupied more time.

## Education Review Office Visits

In each school, some teachers were ambivalent about Education Review Office visits, although staff in 3 schools had found aspects of their latest visit both positive and supportive.

Teachers at one school were positive about their last Education Review Office visit. The team had been friendly and supportive and did give positive feedback. The school was well-advanced in implementing the curriculum and already had good systems in place.

> We found them very positive. We felt after they had talked to us that we were doing pretty well but we all know everyone can do better. We thought it was probably the assessment area that we could improve on. It was an extra pressure but it wasn't scary or negative.

In other schools, negative comments focused on what teachers saw as Education Review Office's excessive and inappropriate attention to record-keeping. Typical comments included:

> You have to dot i's and cross t's; a lot of retrospective planning goes on.

> I think Education Review Office are nit-picking . . . I wouldn't mind if they were consistent. In one school we visited they had two systems of record-keeping - one which was nice and easy and one which was time-consuming and complicated. We got told we should be keeping something along the lines of the simpler one; they were told they had to keep one along the lines of the complicated one. Do they think we want to sleep here? When all's said and done, it's only a job.

While many teachers became stressed and anxious at the very thought of Education Review Office visits, principals and senior staff appeared to be more accepting of both the visits and their outcomes. One principal criticised their requirements which 'are not necessarily focused on children's needs".

Three teachers did not like the impersonal nature of Education Review Office visits, where reviewers spent time in their classrooms but gave them no personal feedback, either then or subsequently. One teacher noted a reviewer had commented on her programme on the basis of her planning rather than on what actually happened in her classroom and she found this inappropriate. A teacher in a large city school summed up the majority view:

> An Education Review Office visit is not a personal thing. They are not coming to see me personally, but if they were coming to see me personally I would be appalled to think they were assessing my ability on what was written in my folders or in my roll book . . . They make these sweeping statements about a staff as a whole in a school and you get no personal feedback. [In one school] we read the documentation they left behind and I was personally insulted. I didn't fit the statement at all.

Staff who were critical of Education Review Office visits implied that as teachers, they had to fulfil requirements set down by the Education Review Office. Staff did not acknowledge that the role of the Education Review Office was to ensure schools were complying with the requirements of the *National Administration Guidelines*.

## Summary

Most teachers thought they were coping reasonably well with the process of curriculum reform, although they also thought their workloads had increased, and many found this difficult to cope with. Teachers varied in their reactions to the pace of change. Most wanted more time to reflect on the documents and pointed out the need to balance time spent becoming familiar with the new curriculum with time spent managing the class on a daily basis. While some thought the documents were being introduced too quickly, others thought it would be better to get the process completed as quickly as possible. More recently trained teachers disliked having to work under 2 systems at once.

Most teachers thought the curriculum reforms were achievable but emphasised the need for support and training. Teachers commented on other factors which added to the stress of coping with curriculum reform while still coming to terms with other structural reforms. Teachers in at least one school were positive about the contribution made by the Education Review Office, but others found the visits of reviewers to be stressful and adding to the pressure of their job.

# ASSESSMENT

As stated in the *New Zealand Curriculum Framework*:

> Assessment is an integral part of the curriculum. The New Zealand Curriculum builds on the close relationship between learning and assessment. It provides clear learning outcomes against which students' progress can be measured . . . The primary purpose of school-based assessment is to improve students' learning and the quality of learning programmes. (p. 24)

In the guidelines on assessment, *Assessment: Policy to Practice*, various steps are listed as being desirable for the development of a school assessment policy (*see* p. 6). We asked the principals and teachers whether or not these steps were being followed in their school. We formed the view that although many teachers would echo the comment of one teacher who said that "assessment has been the big push for the last 2 to 3 years", not many staff were familiar with *Assessment: Policy to Practice*. Only 2 or 3 thought that the process their school had gone through in developing an assessment policy was similar to that outlined in the guide. Where a similar process had been followed it had invariably started with the principal and staff, and never the boards of trustees. One teacher went so far as to say:

> BoT stays out of education. They stay out of professional matters here. They're an excellent board.

Another teacher commented:

> We looked at the document [*Assessment: Policy to Practice*] last week with the English assessment group, and laughed. That's just the Ministry's idea of what happens in a school.

## Is There a School-wide Policy?

In most schools assessment was an important issue for teachers. It was probably the aspect of the New Zealand Curriculum which concerned them most. However, only 3 of the principals said there was a school-wide policy on assessment in place. One of these commented on how much easier it was to work on such issues with the more recently appointed staff who were much less resistant than previous staff, who had been inclined to view assessment as a waste of time. Schools were more likely to be working towards a policy than to have one in place - to be "moving down the track" on developing a school assessment policy.

Many examples were given of staff meetings held to discuss assessment issues. In one school staff had recently decided to allocate a full teacher-development day to the topic. A facilitator from teacher support services had been employed, and all staff were involved in what was described as a very successful day. It was expected that this experience would lead to the development of a school policy.

In a second school the principal said assessment had been a major theme the previous year and staff were now trialling various systems prior to developing a policy. His view was that there was no point in writing a policy until staff were convinced assessment practices were appropriate. In his words, "I'm not a fan of writing policies until they actually work".

One principal felt that the diagram in *Assessment: Policy to Practice* (p. 6) implied that staff development followed the development of policy, whereas in her school policy development followed staff development.

In another school progress towards a school-wide policy had been triggered by a recent Education Review Office visit. According to the Education Review Office report the school had a satisfactory programme of work, but staff had no way of knowing how successful it was.

Developing a school-wide assessment policy may be devolved to the deputy principal or assistant principal who do not necessarily have release time to assist with responsibilities of this kind. One classroom teacher described her deputy principal as a "very hard worker" but as she went on to say,

> It's hard to take all this on board [developing an assessment policy], to give professional leadership and run a classroom as well.

## Reasons for Lack of a School-wide Policy

### Earlier Systems Have Worked Well

Where staff have had systems in place that they believe have worked reasonably well in the past, they needed to be convinced of the merit of change. In the words of one principal:

> Since 1989 there's been a whole lot of jumping on bandwagons which has wasted an immense amount of staff energy and money to no avail. I want to be convinced that what we're doing is a worthwhile use of our time in terms of what is happening in the classroom. Our basic measure is how is it going to benefit kids in the classroom? . . . It is no good racing and changing things if the result is going to be a staff who are too worn out to actually implement anything.

A few staff expressed concern that in any new policy they might be expected to discontinue what they knew to be good practice. One ex-reading recovery teacher, for example, had this to say:

> If anybody tells me that the 6-year net, for instance, needs to be thrown out to fit into this [assessment document], I'd fight like a dog because what we've used is such an easy document with which to diagnose a child. One of the real issues for me about this assessment - the summative and formative - is that diagnostic is getting slightly pushed out of the picture all the time. It's counterproductive.

### Lack of Consensus Amongst Staff

There needs to be a degree of professional understanding and agreement amongst teachers before a school-wide policy can be put in place. For example, in the largest school in the sample a senior teacher thought that the reason why there was no school policy was because there was "not a united feeling amongst the staff". She was trying to establish an evaluation procedure at the junior school level which would ultimately go through the school but as yet that process was not working, so each level was doing their own and a range of assessment procedures were operating. More leadership was required from the principal to give direction.

**Teachers Need to Believe in the Value of Assessment**

At least one principal said that in her view staff assessed children because they were expected to but had only recently started to do it in any systematic way. In her words previously staff would:

> . . . do the occasional running record but because the data was never reviewed and just piled up there was never any feedback on how well that was done. Staff didn't always see the importance of the cycle of monitoring, planning, teaching, monitoring. Most do now but some still don't take any notice of the monitoring they do. They do it because they have to do it - it's the expectation of the school. I think that's part of our ongoing development.

Similarly a deputy principal spoke of the need for all staff to have an understanding of assessment issues and be comfortable with possible approaches before an assessment policy could be written for the board of trustees. This could be a long process because, in her view a prior step would be for some staff to "change their belief systems about how children learn".

**Pressure on Time**

Teachers were so overloaded it was difficult to find the time to develop a school-wide assessment policy and then to train teachers to use it effectively in the classroom.

**Lack of Staff Familiarity With the *New Zealand Curriculum Framework* and All Curriculum Statements**

It was an essential first step for the principal and teachers to be familiar with the *New Zealand Curriculum Framework* and all curriculum statements before an appropriate school-wide assessment policy could be developed. Assessment priorities are outlined in the NZCF. The essential skills as described in the NZCF are central to all curriculum areas but teachers tended to be more experienced with assessment in some areas, for example mathematics and language, and not in others, for example, social studies and the arts.

## The Aggregation of Data

The principals and teachers were asked to comment on the policy and practice in their school of the aggregation of data "to contribute to wider school and national requirements" (*Assessment: Policy to Practice* (p. 32)). While it was a common perception of teachers that there were extensive records kept on individual children at the classroom level, there was less clarity about how a school-wide picture of pupil progress might be recorded. Various practices were described by teachers as a means by which senior staff and others could get an overall picture of the achievement of children in the school. These included:

- Individual teachers passing on records to syndicate leaders who passed them on to senior management for school collation.

- Monitoring children's progress every 6 weeks, mostly in reading and mathematics, by collating information across the school, although in one school at least staff have yet to work out the most effective way of presenting the data and what to do with it.
- Data-gathering sheet filled in 3 times a year on spelling, reading, and mathematics.
- Collecting samples of children's work in folders which, along with individual cards and sheets, follow them through the school.
- Each teacher having a book on each child which has entries rather like the old progress and achievement registers.
- Using external tests as a measure of achievement. (Those referred to were developed in Australia.)
- Having an overall sheet at each class level where information is collected in the reading/language area, including target tables.
- Having a book for parents which is sent home every 6 weeks and contains the child's work for that day, or samples of work. Parents are expected to sign and comment.
- Using results of progressive achievement tests (PATs) to give a broad outline of pupil achievement.
- The development of new entrant 5-year-old checks as the first stage in the aggregation of data.

Not all these processes could be considered to be ways of aggregating data about children on a school-wide basis. The sole charge principal described what was probably the most systematic systems for aggregating data. She presented data at every board meeting using graphs and pie charts to show the level of progression in mathematics and progress in reading. She was the only principal who commented on the way the data were analysed and the subsequent use made of the figures. A second principal acknowledged that although the school now had good systems for the aggregation of data at the syndicate and school level,

> There's not a lot of analysis of the data done in terms of judging the effectiveness of programmes, for example, if the data reveals a weakness in basic facts what are we going to do about it?

Only one principal and one deputy principal made any reference to developing a computer programme as a way of aggregating data. They thought that not only would this produce effective information but it would also reduce teacher workload. Computer programming was seen as a necessary first step to producing useful data to monitor improved outcomes from teaching programmes over time. But only certain forms of data are amenable to this form of aggregation.

One or two examples were mentioned where a move was being made towards the aggregation of data in conjunction with a recent teacher-development contract, for example, technology, and the concurrent development of a school policy for that curriculum area. A component of the assessment was graphing children's progress on a school-wide basis.[13]

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[13] The Education Review Office (1995a) has expressed its concern about the lack of progress made by schools in aggregating data:

> "Aggregated information about student achievement is essential to the planning, management, self-review and reporting process required of schools. It enables a school to evaluate and report its success in fostering student achievement, in identifying and addressing barriers to learning, in increasing participation and success for Maori, and in other management practices required by the *National Curriculum Guidelines*.

Several principals and teachers raised possible problems with the aggregation of data, for example:

- It would be easy for invalid comparisons to be made between children and for data to be misinterpreted.
- If the categories for classifying children were broad (for example, a 3-point scale), how useful were the data for teachers and parents?
- While staff were trying to figure out co-ordinated systems, individual teachers were continuing to use their own methods. This meant documentation and records might be of little use and not very accessible to other teachers.
- The limitations of assessment, or data recording, as a contribution to assessment need to be recognised - "All the things that impact on a child's learning don't necessarily come through in a tick/cross method - did the child have breakfast, did Mum and Dad have a bust up, or did Dad move out?"
- How can teachers be sure that their judgments and assessments were comparable to those of teachers from other schools, and should they be concerned about this?

## The Importance of Syndicates

Syndicates are an important management structure in schools, and it was frequently at this level that the development and implementation of an assessment policy was discussed. It was common for a record of children's achievement in reading and mathematics to be recorded at the syndicate level. Where aggregation of data from individual classes occurred, it was likely to be at the syndicate level and to be used as a tool in planning programmes of work. Several teachers said that they thought that planning and recording at the syndicate level was more effective than at the school-wide level. One or two commented that it would be helpful if there was a more "seamless" system through the school; that assessment worked at the syndicate level but did not necessarily carry on from one syndicate to another.

## The Level of the School

It was a commonly held view that the range of skills it was appropriate to assess varied with the level of the school. The younger the child, the more difficult it was to assess progress. For example, how can achievement-based assessment be used in the junior school? A couple of assistant principals said they thought that appropriate assessment methods such as running records and anecdotal notes were already in place at the junior school level. Junior school teachers may be moving towards more diagnostic and formative assessment, but it was still an area of much staff discussion. Some teachers regarded assessment as easier and more appropriate at the senior level. A wider range of assessment techniques was possible, and written work could be marked out of class. At the junior level assessment had to be more "hands on" and by observation.

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"The reality, however, is that the *National Curriculum Statements* tend to emphasise achievement in relation to the individual with little emphasis on achievement in relation to groups. Neither boards of trustees nor principals yet have a sense of the need for collating and analysing group assessment information as a means of measuring a school's progress against the requirements of its charter. Nor have they sufficient guidance in how they might go about this evaluation task." (p. 34)

## Issues at the Classroom Level Raised by Teachers

Several deputy principals and assistant principals said that the main responsibility of teachers was to focus on children's learning and to provide stimulating teaching programmes. Assessment was just a tool and had to be seen in this broader context. Issues tended to be resolved if teachers took time to work out an agreed-upon plan.

### 1. Time Involved in Assessment

- All teachers thought more assessment was expected of them and it had become more time consuming. While many resented this, others who had set up systems which suited them acknowledged the strengths of the new approaches. In the words of 2 teachers:

> A huge amount of work but I find it effective, wonderful because you're not writing vague things. It's not just busy work. It increases that productivity as far as children are concerned. They know exactly what we're tying to achieve. I show them objectives at the beginning and they assess on them . . . they learn to take more responsibility for their own learning.
>
> It takes a lot of time but it [the assessment approach] certainly has its good points because it forces you to look at each child as an individual . . . instead of just saying at the end of a unit, 'That went really well' . . . if you take the objective you've decided to assess at the end of the unit it gets you to focus on what information the children can recall. It is a teaching tool.

- Assessment is ongoing. It never stops, and teachers can "never get rid of it".

### 2. Value of Assessment

- Concern About Increased Emphasis Placed on Assessment

A few teachers spoke of their concern that assessment requirements might dominate teaching programmes and run counter to their philosophies of teaching and learning. They questioned the amount of assessment required because of the number of levels in each learning area, particularly for younger children and in those areas of the curriculum where gaining knowledge was less likely to be sequential.[14, 15]

- What volume is appropriate?

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[14] Teachers who hold these views are reflecting concern expressed by a number of commentators, for example, Elley (1993), who emphasises that "testing is not an exact science" and is particularly critical of the "eight-level progressive structure in each curriculum area". He concludes that "It would be a pity if what benefits there are in curriculum reforms were to be undermined by needless assessment requirements which cut across desirable aims." (p. 47)

[15] Similarly Aikin (1994) comments: "It is this model of 'progression' determined by assessed achievement on a linear and hierarchical route that appears to conflict with the 'child-centred' approach espoused by primary teachers in New Zealand". (p. 2)

At least half of the assistant principals and deputy principals thought that teachers were assessing too much and too often. Many teachers also questioned the volume of some of the assessment being carried out in the school. One teacher who thought teachers in her school were expected to record children's progress too frequently, commented:

> I feel that a good teacher assesses her children constantly without having to rush around after them with bits of paper every time they do something. I object to having to do that because I want to spend quality time with my class. I'm a teacher who spends all my time with the children when the children are there rather than sitting at my desk and setting them work which is what some teachers do. I object to spending some of this time finding bits of paper and lists of things to tick off while they're working. . . when I open a child's evaluation folder and see lists of ticks and crosses I take very little notice. I'll read the comments before I look at all the ticks.

Other teachers commented:

> We do have assessment - heaps and heaps of assessment pages and papers. The kids have got files this thick. I think they go over the top in this school - there's more than twice as much as at my last school which I thought was adequate.

> We have huge numbers of records, personal dossiers on each child where there is diagnostic, summative, formative, and anecdotal and all sorts of stuff. You have to make 2 trips to your car if you want to work on them in the weekend. All those things show a progression in the child.

- How can assessment be used as a means of trying to build on what children know?
- Of what value is assessment other than for the classroom teachers?

One teacher who believed teachers were "burning themselves out unnecessarily developing systems of assessment which no one else was going to use" instanced lack of interest of secondary teachers in the assessments of children made by primary teachers. As one secondary teacher had told her, there were so many different systems in primary schools that secondary teachers were not going to "wade through" all the primary documents. They would assess children on entry using Otis[16] or Tosca and go from there.

- To what extent does assessment make a difference to children's learning?

### 3. What Objectives Should be Assessed?

- Some aspects of work were capable of being assessed and some were not. Teachers needed to have clear objectives as to what they are attempting to teach so that they could assess what the children had learnt.
- It was not possible for all aspects of a unit of work to be assessed for all children. Two approaches were referred to by deputy principals and assistant principals. One was to focus on one specific skill to monitor, and the other was to focus on a limited number of children, say 5 or 6. As an example of focusing on a limited number of children, one assistant principal said that staff had

[16] In fact Otis has been out of print for about 20 years.

recently decided that they had previously focused too much on data gathering. Each teacher was now concentrating on 2 children to "get a picture of the planning, teaching, and assessing throughout the school". Each of these children was looked at every 6 weeks. If concerns were revealed, more children were looked at.

- Teachers who had participated in an in-service day were relieved to hear that they were not expected to "assess everything for every child" and that there were a lot of different ways of assessing children's abilities and progress - where they were and where they had progressed to.
- Are too many assessment points recommended in some documents, particularly at the junior level?

**4. How Should Activities be Assessed?**

When teachers described the methods they used to assess children all the methods as outlined in *Assessment: Policy to Practical* (*see* pp. 16-23) were mentioned:

- informal assessment by teachers,
- observation,
- self-assessment by students,
- peer assessment,
- conferencing,
- portfolios,
- benchmarks (exemplars), and
- tests.

However, one of the key issues for teachers still was what are the most appropriate assessment methods for the range of classroom activities children are engaged in? Assessment was something more than "just ticking boxes".[17]

- Assessment for many teachers was still very much trial and error, and trying out other people's ideas.
- Linking assessment activities to teaching objectives and learning outcomes was important. How to build assessment into the teaching programme and not regard it as an "add on"; for example, the teacher has a sheet for a unit of work on which she writes her learning outcomes and records on the sheet what each child achieved.
- How to set up simple and effective systems that suit the teacher and enable children's progress to be monitored regularly. How manageable were recording systems?
- How to fit evaluation into the teaching process so that there was less need to set tests and assessment tasks. Assessment should be ongoing through a unit rather than sheets at the end.
- How could a teacher show that she had moved the children on? Does this require just a tick, or a subjective comment?
- How could children be involved in their own assessment so that they became familiar with the process? The sole-charge principal gave an example from her school:

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[17] Appropriate assessment strategies are well addressed in Croft (1995) *Assessment Strategies for the New Zealand Curriculum Framework* in *Best of set: Assessment Number Two*. Wellington, NZCER.

> We do a Monday book which goes home every week with examples of their work - handwriting, mathematics, play writing, reading and spelling. I comment on it, they comment on it, their parents comment on it and their peers comment on it. That book is our assessment procedure. The kids graph the results, e.g., basic facts sheets. It's like a school report.

- How to record supporting evidence to show children's progress in a way that is useful for others, for example, parents.
- How to keep assessment personal (particularly if computers are to be used) - "assessment is just as much about what a teacher thinks of a child as it is a mark".
- What do you do with the other children?

> These people sitting in offices in Wellington come up with these glorious ways that are going to do it so marvellously and forget that you've got 32 other children sitting there while you're testing this one little darling.

## Curriculum Areas

We asked teachers if there were specific assessment issues for particular curriculum areas, particularly mathematics and science, as these were the first 2 curriculum statements to be implemented. A range of individual comments were made which were difficult to classify. Many of the teachers raised issues that had already been commented on, and other comments would apply equally to other curriculum areas. For example: the curriculum statements have led to a change in focus and assessment was now regarded as an integral part of teaching and learning; there was consistency within and between documents and assessment for mathematics and science "all hangs together and is consistent with the achievement document"; because the curriculum documents were new teachers had to develop new assessment tasks to make sure they covered all the skills introduced in the documents; teachers were having to come to grips with a broader range of assessment tasks; and keeping accurate records of children's progress in a specific curriculum area could be difficult because they may achieve differently in the various strands.[18]

## Summary

Assessment is an integral part of the New Zealand Curriculum. It was probably the aspect of the curriculum that teachers felt they needed most assistance with. Only 3 of the principals said there was a school-wide policy on assessment in place although most were working towards one. The main reasons for a lack of policy were usually lack of consensus amongst staff and a belief that earlier systems had worked well.

While it was a common perception of teachers that there were extensive records kept on individual children at the classroom level, there was less clarity about how a school-wide picture of pupil progress might be recorded. Planning and recording at a syndicate level tended to be more effective than at a school-wide level.

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[18] The NZCER Assessment Resource Banks Project is in part designed to assist with the development of a broader range of new assessment tasks for teachers. A report of that study should be available early in 1996.

Several senior teachers emphasised that the main responsibility of teachers was to focus on children's learning and to provide stimulating teaching programmes. Assessment was a tool which had to be seen in this broader context. Issues for teachers included: the time involved in assessment; the value of assessment; what should be assessed; and how activities should be assessed.

# THE NEW ZEALAND CURRICULUM AS IT RELATES TO MAORI

As stated in the *New Zealand Curriculum Framework,* one of the principles that gives direction to the curriculum in New Zealand schools is the recognition of the significance of the Treaty of Waitangi. In order to do this "The school curriculum will recognise and value the unique position of Maori in New Zealand society". (p. 7)

We asked the principals and teachers whether they had any comment to make about the New Zealand Curriculum as it related specifically to Maori, and whether or not they were aware of the recently released draft Maori curriculum statements. There was little consensus in the opinions of principals as to any consequences for Maori or Maori education of implementing the New Zealand Curriculum. The principals' opinions ranged from one principal who said he had not looked at the curriculum documents from a Maori perspective, to a second who said that "looking at bicultural aspects will come later when staff are more familiar with documents", to a third who said that "There's provision at every level with every strand [of the curriculum statements] for incorporating a Maori perspective". The teachers' comments reflected a similar range of opinion. On balance, they were likely to think there was plenty of scope within the curriculum statements for teachers to incorporate a Maori perspective. This was particularly so with science. Neither principals nor teachers were likely to be familiar with the draft Maori curriculum statements.

Other issues raised by principals and teachers were:

- Schools with low Maori rolls were less likely than those with a higher proportion of Maori pupils to focus on tikanga Maori.
- A number of pakeha teachers commented on their lack of knowledge of tikanga Maori and the danger of tokenism. Limited language skills on the part of teachers who may be "only one step ahead of the children", meant that children were likely to repeat the same range of language experiences from class to class rather than progressing in their knowledge. Lack of Maori language fluency on the part of teachers also meant that they put aside documents with Maori language content.
- There was a need for teacher development in tikanga Maori for teachers who trained in the years before there was much emphasis on Maori in initial courses of teacher education.
- The documents may reflect a bicultural approach but the documents in themselves will not further Maori children in their education or assist pakeha children in understanding a Maori perspective.

Schools need to be adequately resourced if the documents are going to influence school practice. Perhaps of even more importance are teacher attitudes towards incorporating a Maori dimension.

- In schools where teachers did incorporate a Maori dimension in their classroom programmes, teachers and pupils just accepted this as the norm.
- Pressure from Maori parents did sometimes result in schools increasing their efforts to develop a bicultural programme.
- Education Review Office reviews were likely to have an impact because of their emphasis on equity issues, including gender, ethnicity, and teachers' responsibility under the Treaty. One principal said she did not agree with what she thought was a requirement of the Education Review Office that teachers should assess Maori children separately so that their performance could be compared with pakeha.[19]
- In schools with immersion units and bilingual classes the main emphasis on Maori language was likely to be within the unit or class. It was hoped that through being taught in their own language, Maori children would achieve better in all subjects.
- For some teachers a more pressing issue than biculturalism was their responsibilities in a multi-cultural school.

## Bilingual Teachers

Bilingual teachers had additional concerns to other classroom teachers. The main one was that as well as having to become familiar with the new curriculum statements (including coming to terms in Maori with concepts presented in English), bilingual teachers often had to translate documents into Maori for classroom use. Not only was this time consuming but there were other complicating factors:

- Not all of the new terms had a Maori equivalent.
- Maori teachers typically use a holistic approach. For example, they might choose a subject such as "the sea" and then relate some aspect of the sea to mathematics or science, whereas topics in the curriculum statements are expected to fit into curriculum objectives. While pakeha teachers may find the approach which is clearly focused on objectives makes teaching easier, this is not the case from a Maori perspective.
- There was a lack of Maori resources to support the curriculum statements. This was not just a matter of lack of money, but also the time and energy to produce them.
- National standards have not been set for assessment in bilingual classes, for example, reading in Maori.
- While most other staff and parents were accepting of bilingual classes, in some schools there was an element of scepticism which has to be countered.

One of the bilingual teachers we interviewed did not know much about the draft Maori curriculum statements although she understood they were to be written from a Maori perspective. However, from

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[19] This is not "a requirement" of the Education Review Office. The National Education Goals link equality of educational opportunity and barriers to learning. It is a requirement of boards of trustees that they should "analyse barriers to learning" (see *National Administration Guidelines*). As part of an Effectiveness Review, reviewers may ask which groups (including Maori) schools have identified as not performing well, and what plans they have in place to address the problem.

what she had seen, the documents followed the "pakeha version" very closely, and "look suspiciously like a translation in parts". She emphasised that when the Maori curriculum statements were finalised, there will be a need for much teacher training and support. A second teacher in an immersion unit was also unfamiliar with the draft curriculum statements in Maori although she was part of a team trialling te reo Maori which she considered to be very much along the lines of the English curriculum statement. She found her earlier experience with the English document helpful in coming to terms with the language and "jargon" of the te reo Maori document. She considered the document to be written from a Maori perspective and to be easy to handle in the classroom.

## Summary

There was little consensus in the opinions of principals and teachers as to any consequences for Maori or Maori education of implementing the New Zealand Curriculum. However, most were likely to think there was plenty of scope within the curriculum statements to incorporate a Maori perspective.

Bilingual teachers, as well as having to become familiar with the new curriculum statements (including coming to terms in Maori with concepts presented in English) often had to translate documents into Maori for classroom use.

# TE MARAUTANGA O AOTEAROA ME TŌNA RITENGA KI TE MĀORI

E kīia nei ki roto i *Te Marautanga o Aotearoa*, ko te whakamana i te Tiriti o Waitangi tētahi o ngā tikanga e whakatakoto huarahi nei mō te marautanga, i ngā kura o Aotearoa. Kia pēnei ai "The school curriculum will recognise and value the unique position of Māori in New Zealand society" (p. 7) arā, me whakamana me uara te marautanga kura i te tūranga motuhake o te Māori ki roto i Aotearoa nei.

Ka pātai atu mātou ki ngā tumuaki ki ngā kaiako mehemea he kōrero tā rātou mō te marautanga o Aotearoa me tōna ritenga ake ki te Māori, mehemea ka mōhio rātou kua puta mai he tauākī marautanga Māori. Kāore e ōrite ana ngā whakaaro o ngā tumuaki mō te hua o ēnei ki te Māori, mō te hua o ēnei ki te mātauranga Māori (ki te whakamahia). He rerekē ngā whakaaro o ngā tumuaki. Kī mai tētahi tumuaki ' kāore anō ia kia tirohia ngā tuhinga marautanga mai i tō te Māori titiro'. Kī mai tētahi atu tumuaki 'A muri nei e tirohia ai ngā āhuatanga kakanorua, kia matatau haere ngā kaiako ki ngā marautanga nei i te tuatahi'. Kī mai tētahi anō tumuaki 'e taea ai e ngā kaiako te whakauru ki tō te Māori titiro i ia wāhanga i ia āhuatanga' (o ngā marautanga). Ka pēnei te whānui i ngā korero a ngā kaiako. Ki tā te nuinga e pai ana te whānuitanga i roto i ngā marautanga hei whakauru ki tō te Māori titiro. E tino pēnei ana te marautanga pūtaiao. Ko te nuinga o ngā tumuaki o ngā kaiako kāore i te matatau ki ngā tauākī marautanga Māori.

Ko ētahi atu take ka whakaputa mai i ngā tumuaki i ngā kaiako:

- E kaha ake nei ngā kura tokomaha ngā Māori ki te aro i ngā tikanga Māori, i ngā kura tokoiti ngā Māori.
- E kīia nei e ētahi o ngā kaiako Pākehā kāore rātou i te tino mōhio ki ngā tikanga Māori, ko te mate o tēnei ka whakahāweatia ngā tikanga Māori. Ko ētahi o ngā kaiako e ako tonu ana i te reo kāore i te tino tōmua tō rātou mōhio i tō ngā tamariki mōhio, ko te āhua nei ka ōrite kē ngā akoranga mā ngā tamariki i ia karaehe, i ia karaehe, ko te tikanga me hohonu haere ngā akoranga i ia karaehe. Ka whakarerea ngā tuhinga Māori e ētahi o ngā kaiako nō te kore matatau ki te reo Māori
- He hiahia nui ki ngā mahi whakangungu i ngā tikanga Māori mā ngā kaiako i ako ai i te wā e itiiti ana ngā tikanga Māori ki roto i wāhi whakaako kaiako.
- Ahakoa e whakaatu ana pea ngā marautanga i te āhuatanga kakanorua, e kore e taea e ēnei anake te āwhina ngā tamariki Māori i roto i ō rātou akoranga, e kore hoki e taea te āwhina ngā tamariki Pākehā ki te mārama i tō te Māori titiro.
- Me whakanui ngā rauemi kura kia āhei ngā marautanga nei ki te aro i ngā mahi a te kura. Tērā pea ko te mea nui ake ko te waiaro o ngā kaiako mō te whakauru i te taha Māori.
- Ko ngā kura e whakauru ana i te taha Māori ki te akoranga i te karaehe, e noho māori kau noa iho ana tēnei āhuatanga ki ngā kaiako ki ngā akonga.
- I ētahi wā, nō te kaha kōkiri o ngā matua Māori ka timata te kura ki te whakatakoto huarahi kia whakatūria he akoranga kakanorua.

- Ko te āhua nei, ka panga atu te mahi a Te Tari Arotake Marauranga ki ngā kura, no te aronga ki te take ōritenga, ki ngā take ira tangata, ki ngā take tikanga-a-iwi, ki ngā haepapatanga o ngā kaiako i raro i te Tiriti o Waitangi. Ka mea mai tētahi tumuaki kāore ia i te whakaae ki tētahi o ngā ritenga o te Tari Arotake Marauranga, arā ko te mahi arotake motuhake i ngā tamariki Māori kia whakarite ō rātou whainga i ngā tamariki Pākehā.[20]
- E kaha nei ngā kura wāhanga rumaki, wāhanga reo rua hoki ki te whakanui i te reo Māori ki roto i te karaehe. Ko te hiahia mā te ako i roto i tō rātou ake reo ka pai ake te whakatutukitanga akoranga o ngā tamariki Māori i ngā marau katoa.
- Ki tā ētahi kaiako ko te take nui atu i te kakanoruatanga ko ngā haepapatanga ki roto i te kura kakano-maha.

## Ngā Kaiako Reorua

He raruraru anō tō te kaiako reorua atu i ngā raruraru o ētahi kaiako. Ko te mea matua me matatau haere rātou ki ngā marautanga hou (me te waia ki ngā kupu Māori e whakatakoto ana ki te roto i te reo Pākehā) he nui ngā tuhituhinga hei whakamāori kia whakamahia ki roto i te karaehe. He mahi whakapau wā tēnei, otirā he raruraru anō:

- Ko ētahi o ngā kupu hou kāore kau he kupu Māori e ōrite ana.
- Ka whakamahia he tirohanga whānui e kaiako Māori i te nuinga o te wā. Hei tauira, ki te whiriwhiri i tētahi marau, ara 'te moana' ka honoa ētahi āhuatanga o te moana ki te pangarau ki te putaiao, engari ko ngā marau ki roto i ngā tuhinga marautanga me noho tonu ki roto i ngā whainga marautanga. Ahakoa ki te nuinga o ngā Pākehā he ngāwari noa te whakaako ki te whai rātou i tētahi huarahi akoranga e tino whai ana i ngā whainga, engari kāore i pēnei ki tō te Māori titiro.
- Kua kore he rauemi Māori hei tautoko i ngā marautanga, ehara i te mea he kore moni noa iho te raruraru, kua kore he wā, kua kore he kaha hei whakahua i ēnei momo rauemi
- Kua kore he paerewa a te Motu mō te arotake ki roto i ngā karaehe reorua, arā, hei tauira ko te panui pukaupuka ki roto i te reo Māori.
- Ahakoa ko te nuinga o ngā kaiako o ngā matua ka whakaae ki ngā karaehe reorua, ka kitea te taha kore whakapono i ētahi o ngā kura.

Ko tētahi o ngā kaiako i uiuia kāore ia i te tino mōhio ki ngā marautanga tauira Māori, engari ki tōna mōhio kua tuhituhia ēnei ki tō te Māori titiro. Otirā ka kitea e ia ka whai tata ngā marautanga nei i ngā marautanga Pākehā, ā, ko te āhua o ētahi wāhanga he mea whakamāori kau noa iho. Ka kī ake ia kia mutu ngā marautanga tauira Māori me whai wāhi mō te whakangungu mō te tautoko i ngā marautanga nei . Ko tētahi atu kaiako i roto i te karaehe rumaki kāore hoki i te matatau ki marautanga tauira Māori, ahakoa ko ia tētahi o tētahi rōpū e whakamātau ana i te reo Māori, ki tēnei ka tata tēnei mahi ki ngā marautanga Pākehā. Ka kitea tēnei he tino āwhina tana whakamahinga i te marautanga Pākehā i ngā rā o mua mō te ako i ngā korero i ngā kupu o te marautanga reo Māori. Ki tō tēnei, kua

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[20] Ehara tēnei i "tētahi ritenga" o te Tari Arotake Marauranga. Ka hono te Whainga Matauranga a te Motu i te ōritenga o te whai wāhi matauranga ki te ngā āraitanga ki te ako. Me tatari te poari whakahaere "ngā āraitanga ki te ako" (Tirohia ngā *Whakahaeretanga Kaupapa Arahi a te Motu*). Ka whatea ngā kaiarotake ki te uiui ko ēwhea rōpū (ko ngā Māori hoki) ka kitea e te kura kāore i te pai te whakatutukitanga mahi, ā, ka ahatia e rātou hei whakatikatika i tēnei raruraru.

tuhia te marautanga nei mai i tō te Māori titro, ā, he ngawari hoki ki te whakamahi i te tuhinga ki roto i te karaehe.

## Whakarāpopoto

Kāore i te ōrite ngā whakaaro o ngā tumuaki o ngā kaiako mō te hua o te whakamahinga i te marautanga o Aotearoa nei ki te Māori, ki te mātauranga Māori rānei. Engari ki tō te nuinga whakaaro he nui ngā wāhi i ngā marautanga hei whakauru i tō te Māori titiro. Ko ngā kaiako reorua, me matatau rātou ki ngā marautanga hou (me te ako hoki i ngā ariā Pākehā ki roto i te reo Māori), me whakamāori hoki rātou ētahi o ngā tuhinga kia whakamahia ki roto i te karaehe.

# IMPLICATIONS OF THE CURRICULUM REFORMS FOR TEACHER DEVELOPMENT AND APPRAISAL

As stated in the *National Administration Guidelines*, boards of trustees are required to "operate a personnel policy that complies with the principle of being a good employer", one aspect of which is to ensure that employees are given the opportunity to develop their own abilities and skills. Thus boards of trustees, in conjunction with their responsibility for curriculum implementation, have also to ensure that there is a programme of teacher development in their school. For its part, the Ministry of Education has provided funding for national programmes of professional development to support the implementation of the curriculum statements. However, schools are also expected to budget for professional-development programmes using other providers. This is made clear in a notice in a recent *Education Gazette*:

> With so many professional development opportunities now available, the planning and prioritising of professional development programmes is an important school management issue. (Vol. 73, No.16, 16 September 1994.)

Certainly the schools in this study were similar to those described by Wilson and Houghton (1993) in that their teacher-development activities were "largely dictated by the need to keep staff abreast of curriculum development" (p. 27).

We asked staff a series of questions about their professional development experience in the context of curriculum implementation including possible links with staff appraisal.

## Teachers' Responsibility For Their Own Teacher Development

Most teachers thought they were responsible for their own teacher development. As one teacher put it:

> I do feel responsible for my own teacher development. If I want my children to grow then it's up to me.

The teachers who thought otherwise believed teacher development was a joint responsibility between teachers and the school. As one beginning teacher commented, for example:

> It's up to me to make sure I'm keeping up with all of these [curriculum statements]. Because I'm a first year it's the school's responsibility too. If the school wants to have someone doing well with this they've got to make sure staff are doing it.

The same viewpoint was held by others besides beginning teachers.

## Whole-school or Individual Teacher-development Courses

While most principals and teachers thought teachers had to take responsibility for their own teacher development, they thought delivery of teacher-development courses should be through a mix of whole-school and individual teacher-development courses. As far as the implementation of the New Zealand Curriculum was concerned, their preference was for whole school development.[21]

However, individual teacher development and whole-school teacher development were not necessarily either/or approaches. Individual teacher development and whole-school development were frequently complementary, with staff choosing to go on courses in areas which were a major focus for the school. However, it was also important for teachers to be able to develop their particular strengths through individually planned personal development. For example, one deputy principal said this year he knew he needed professional development in music, whereas one of his colleagues was more concerned about mathematics.

## Advantages of Whole-school Development

- Whole-school teacher development was effective because it brought the staff together and "everyone was on the same wave length". It helped a school with its focus and direction for the year.
- It is important for staff to learn together and be in a position to support each other, particularly if problems arise, so that solutions can be worked out collegially. Because of the shared experience, staff have a basis for a continued dialogue. These two points support findings of Bell and Gilbert's (1993) major study on teacher development. They comment:

> The prime purposes of teacher development are to help teachers both feel better about themselves as teachers, and to improve teaching and learning outcomes in the classroom. These two purposes are closely related. Teacher development is helped when teachers are able to talk with each other about what they are doing in the classroom as an integral and key part of the programme. It is not something to be left to chance before or after any meetings . . . teacher development involves social development. Teachers develop new ways of working with and relating to other teachers and students. The isolation of the classroom is valued less, and collaborative ways of working are valued more for support and feedback. (p. 366)

- Staff work together but the principal also has to play a leadership role to make sure the curriculum is implemented.
- It ensures busy teachers do not let their teacher development "slide".
- Teachers who lack the confidence to initiate their own programmes can be given a "little bit of direction and push".
- It was easier for senior staff to monitor staff development because all teachers were focusing on the same curriculum area.

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[21] This finding reinforces a recommendation of Gilmore (1994) that: "Schools/principals be encouraged to arrange teacher development for their staff so that whole schools, departments or syndicates participate concurrently" (p. xv).

## Issues

### Availability of Teacher-development Contracts

Teachers' attendance was obviously influenced by the number of contract courses. Teachers were critical that not all teachers had equal opportunities to attend. A problem for rural areas may be that courses are cancelled because there are not enough enrolments to make them financially viable.

### Follow-up From Teacher-development Contracts

It was usually assumed that teachers who took part in teacher-development contracts had a responsibility to take a leadership role in the curriculum area in the school and to share their experience with other staff. While this appeared to be successful in most schools, not all teachers agreed and some believed there were problems in practice. One deputy principal, for example, said that he felt that if a teacher went on a course it was up to them as to whether or not they had to report back to staff. It was part of his contract that he should do that, so that was fine with him, but he had heard of cases where principals demanded that teachers who had been on courses played a leadership role in the school, and other cases where teachers wanted to lead other staff, but were not welcome. Another teacher commented:

> . . . it's not fair to give them the responsibility to transfer that information to the whole staff. It just doesn't work. They come to staff meetings for one hour but they've had maybe two days to work on the ideas so you don't get the same transfer of information.

Another teacher commented on the issue of seniority:

> When my senior teacher did the science and mathematics contracts she was able to make us use the documents because she was a senior teacher and so had respect. It's a problem with me as a junior teacher with language - getting credibility - I'll just have to demand it. Older teachers are so much more articulate at quashing you. They say, 'This works for me, why should I change?'

### Continuation of Teacher-development Contracts

Teachers would like information about how long teacher-development contracts in specific curriculum areas were likely to be available. For example, if someone has recently returned to teaching or missed out on earlier mathematics and science courses for other reasons, including changing schools, are they likely to have an opportunity to attend similar courses at a later date?

### Strengths of Individual Teachers

Teacher development in a school can be influenced by the curriculum strengths of individual teachers. For example, one principal said science in his school was strong because of the leadership role played by one teacher who had special skills in science. Not all schools had those key people.

**Finances**

We did not ask detailed questions about school budgets for teacher development, but cost could be a limiting factor as to which and how many courses teachers attended. Schools varied in the amount they allocated for teacher development, and school size was not necessarily a factor. One assistant principal who described the opportunities for teacher development in her school as "really great", said the school did give financial support but there was a limit to how much was available. She had done Advanced Studies for Teachers (AST) papers in the past but was not going to this year because they were so expensive.

Another teacher who felt responsible for his own teacher development was irritated that he was constrained by financial considerations, particularly as he did not have any input into the planning of the teacher-development budget. In his school teachers have to indicate how much they need but in reality "Mr Treasurer says this is how much there is and the principal splits it up. Teachers don't really have any input."

Another deputy principal mentioned that she had had assistance towards expenses for a drama course the previous year but the allowance for 1 year is used up quickly. A third teacher described the system in place in her school:

> We all see the resource schedule. Everything is put before us. We have the chance to have our choice. Often there's quite a lot of things you want to go to and there's a limit to the amount you can be supported monetarily. For instance I did 'Skills for Learning' and the school paid the majority and a small amount came off my professional development budget . . . We all went to 'Upbeat Music' and that's paid for out of the budget. We have some personal choices; we have some things that are school-wide; and the contracts. It's great.

In yet another school a teacher compared his present position unfavourably with his experience at a previous school:

> I think funds should be made available and teachers allocated a certain amount. At my last school there was a definite policy - we were allowed 3 days release for teacher development a year and then we negotiated what courses we would do for these 3 days. Here there is no policy as such. When I asked the senior teacher she said you just decide what you want to go on and then ask the boss.

**Time**

Time to fit in out-of-school-hours teacher development was a constraint. In the words of one teacher:

> I do feel responsible for my own teacher development and I've been promising myself to do papers since I came back to teaching but I haven't got around to it. By the time we get everything else in - the garden, trying to stay reasonably fit - I found every single working hour, and some sleeping ones, were tied up with education. I'd had enough so I took some interior decorating papers to keep me sane.

**School Size**

There may be a problem with whole-school development in large schools both because of the sheer numbers, and individual staff who may be reluctant to be involved. Several teachers in the largest school in the sample thought that teacher development was more appropriate at the syndicate level.

Change may also be more effectively brought about by leadership being exercised in small curriculum groupings, rather than trying to bring a large, disparate group together all at once.

**Participation of Principals**

The teaching principals attended curriculum courses as regularly as other staff but only one of the non-teaching principals did so.[22] Non-teaching principals were more likely to go to management courses.

**Pitching Courses at a Level to Suit All Teachers**

One teacher who thought individuals should plan their own teacher development "because individuals should concentrate on developing their own strengths and facing up to their weaknesses", was opposed to school development which she thought was:

> . . . really a waste of time and resources. We're doing the English one right now and that will bring perhaps half to two thirds of their staff up to speed but for me it's a big waste of time because I did a lot the year before and I'm an 'expert' in the field so the money's wasted on me. And it's probably wasted on perhaps half a dozen others who are also past that stage.

## Staff as Facilitators of Courses

Teachers were asked if they had ever acted as facilitators for teacher professional-development courses because in earlier discussion with staff from teacher support services, the view was expressed that teachers who acted as facilitators greatly benefited from the experience. None of the teachers interviewed had acted as facilitators for teacher-development contracts with the Ministry of Education, but one had run courses in English and in management, acting as a consultant out of school hours.

## Teacher-development Courses Attended by Teachers

Principals and teachers were asked what teacher-development courses they had attended over the last 2 years. Virtually all staff had been involved in courses. In most schools, teacher development was focused on implementing the New Zealand Curriculum and the majority of teachers had attended at least one teacher-development-contract course in science, mathematics, English, social studies, technology, or assessment. However, teacher development was by no means limited to teacher-development contracts. In at least 2 schools, the number of courses run by other providers which were attended by teachers equalled or outnumbered contract courses, and in several instances were attended by all staff. Some of these courses also focused on the curriculum areas of recently released curriculum statements, for example, reading and written language, plans for mathematics, technology, and social studies. The range of other courses listed by teachers was broad and included such topics as: assertive discipline; starting school; upbeat music; gymnastics, movement, and dance; first aid; art; kiwi sport; gifted children; children with special needs and abilities; and librarianship. There were also courses for tutor teachers and beginning teachers, as well as a series designed for teacher aides on

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[22] It is interesting to note that Newth (1995) concluded that "principals should be involved in all major contracts in which their schools are participating." (p. 39)

topics such as supporting reading and language, oral language, assisting with spelling, and behaviour management.

## Effectiveness of Teacher-development-contract Courses

Nearly all comments about courses were positive, regardless of the model used. An exception were several teachers from a Grade 5 school who said a mathematics teacher-development programme the school had been involved in had not been entirely satisfactory. The facilitators had presented it well but some staff in the senior school were resistant to change and had not believed that the school would benefit from the new developments. With such a wide range of opinions amongst staff it was hard to develop new policies and put them in place. Another teacher from a different district was also critical of the mathematics courses. She described the 1995 courses on English as "brilliant" but the previous mathematics courses "were a waste of time". The information was not new and she could not see any point in courses where the lecturer simply "regurgitated" a book.

The principal of the school, which was not following the Ministry's timeline for curriculum implementation, was one who was critical of the teacher-development contracts. This school also based their teacher development on a whole-school model but usually relied on expertise within the school and did not bring in outsiders. In explaining why staff had decided not to take part in Ministry of Education contracts at present she commented:

> We were dissatisfied with the earlier science contract. We thought it didn't relate to the needs of the school. It was a very top-down approach, not really taking into account where the staff were at. We have decided not to opt into Ministry contracts because we don't feel they will meet our needs. Even though courses are presented as a school-based model they aren't really because they don't have the resources, financial or human, to actually implement it properly on a long-term basis which is what is required. I have some doubts too about the abilities of some of the facilitators although we do use - Teacher Support Service - they provide a good service.

## Commitment of Teachers

We formed the impression that teachers were anxious to keep abreast of professional developments. One experienced teacher, for example, commented:

> I've got an advanced diploma. I've done 21 AST papers. Once I turned 40 I made a point of doing two or three a year to make sure I wasn't lagging behind although I haven't got the time or the wish to do any more at the moment.

Another teacher in commenting on the amount of extra work she had been doing added:

> . . . my husband was threatening to throw my suitcase and all the other things outside and he said, 'Go and stay at your meetings!'

## Staff Appraisal

Principals and teachers were asked if there was a system of staff appraisal in place in the school; whether there were any links between teacher professional development and appraisal; or between

appraisal and the implementation of the New Zealand Curriculum.

Six of the 7 principals said there was a policy on staff appraisal. In the seventh school there was a development policy but not an appraisal policy. This was later confirmed by the assistant principal and deputy principal of the school who said they were not aware of any school policy but were "starting to think about one". A teacher from this same school commented that "appraisal is not a strength of this particular principal" and was surprised that he had had virtually no contact with the first-year teacher to see how she was getting on. He also rarely visited other teachers in the classroom. In another school one teacher said that as a part of their staff-development policy this year staff were going to be engaged in writing a policy for the appraisal of the principal.

Examples of systems of staff appraisal:

- The most common form was self-appraisal in pairs against individually set objectives. The pairs were usually colleagues but in one school teachers had a choice as to whether they chose to work with a colleague on their staff or someone from outside. The policy as described by one assistant principal was that each staff member chose a colleague to work with and selected one or two goals she wanted to focus on. This was documented on a form and time was set aside to talk and for the colleague to visit the classroom a couple of times a year. In one school at least, the goals were linked to the teacher's job description and included class and school culture as well as professional development.
- Beginning teachers were commonly appraised by their tutor teachers, perhaps linked to the use they chose to make of their .2 release time.
- Appraisal was built into some teacher-development contracts, for example, technology.
- For the sole-charge principal, staff appraisal was included in her performance agreement. She was appraised as a principal and a classroom teacher by the board of trustees and the community.
- The principal appraised teachers on terms of "Where staff are at, where they want to be, and how to get there".

## Links Between Teacher Professional Development and Appraisal

All deputy principals and assistant principals in schools with an appraisal policy thought there was a close link between professional development and appraisal. Several said appraisal helped teachers identify their goals and needs. Appraisal could work in one of two ways. Either the process of appraisal became the basis of the teacher's subsequent professional development, or the appraisal was used as a way of monitoring whether or not a professional development experience had led to the development of professional skills. For example, one assistant principal who was currently taking part in an English contract was intending to ask to be appraised on specific goals she was going to select from the English curriculum statement. One principal who said there was a close link between the school development plan, the implementation of the New Zealand Curriculum, and teacher appraisal said a lot of time had been spent on looking at teaching programmes, updating resources, and future curriculum development related to the New Zealand Curriculum. Now he wanted to make sure that it's "actually getting through to the troops". Because so much time had been spent on the mathematics curriculum statement and ensuring that resources were available, teacher appraisal this year was to be based on how successful teachers were in implementing the mathematics curriculum, including outcomes for children. This was an acceptable approach with teachers because, in the principal's

opinion, there was such a high level of professionalism amongst the staff. He thought that now that the school was responsible for appointing its own staff, the standard of teaching had improved and he had no difficulty introducing new ideas. He knows that once staff have taken a new idea on board it will be carried out.

Teachers who described pair appraisal systems commonly said that the objectives they selected to be appraised against did relate to the curriculum. However, one of the beginning teachers did not think there was any link between appraisal and the implementation of the New Zealand Curriculum because from what she has heard:

> . . . it's not a check on planning or anything like that but on what's going on in the classroom in terms of management and the way you're interacting with the children.

In the school which was not adhering to the Ministry timelines for curriculum implementation, the deputy principal thought the principal ran a very well-thought-out system of staff appraisal linked to the objectives of what the staff were trying to achieve. She said there were close links between teacher development and appraisal and that for the first time in her teaching career the process was being closely monitored. The principal herself said:

> I'm a great believer in not separating out the teacher development thing into separate components. To me, if your school development is going well, that's your appraisal system as well in the sense you know whether the teachers are meeting their basic requirements. . . . If there were concerns and we couldn't provide support for that person to meet those concerns and there wasn't change, then you'd start gathering data for a formal competency issue. We have a formal competency policy that lays that down - in class observations, data from the students, planning and monitoring.

**Issues**

- Appraisal needs to be done in a supportive atmosphere.
- Appraisal may be a problem if the teacher being appraised is more knowledgeable than her peers, for example, wants to be appraised against specific goals she has set herself in relation to the English curriculum statement, but her colleagues are not very familiar with the document. In that case teacher support services might be used instead of a school colleague.
- The basis on which to select a colleague to do the appraising can be an issue, for example, should it be on the basis of experience in a curriculum area, or the level of the school?
- Experienced teachers can have difficulty in finding new areas in which they feel the need to be appraised year after year. As one long-serving teacher commented:

> It's [appraisal] a pain. I'm being perfectly candid here. I quite see the need for the principle of appraisal and in the past I guess that the appraisal has made me sit down and think "what can I appraise? What is not working well?" In terms of making me think about an area it's been good. But when you've been doing it for 4 or 5 years you get to the stage of, 'What on earth am I going to do this time?' and it does become an added stress - one more thing that has to be done. And if it's not going to make change, is it valuable?

## Summary

Boards of trustees have a responsibility to see that their employees are given the opportunity to develop their professional skills. We formed the impression that teachers were anxious to keep abreast of professional developments. The Ministry of Education has provided funds for national programmes of professional development to support the implementation of the curriculum statements but schools are also expected to make use of other providers, the option chosen in the 7 case-study schools. In at least 2 schools, the number of courses run by other providers which were attended by staff equalled or outnumbered contract courses.

While most principals and teachers thought teachers had to take responsibility for their own teacher development, they thought the delivery of teacher-development courses should be a mix of whole-school and individual teacher-development courses. As far as the implementation of the New Zealand Curriculum was concerned, their preference was for whole-school development because it helped teachers to work together and for the school to have a focus for the year.

Most comments about Ministry of Education contract courses were positive. However, not all teachers were able to attend Ministry of Education contract courses and the follow-up from courses varied from school to school. Usually teachers who attended a course in a particular curriculum area were then expected to take a leadership role in the school in that area. Teachers would like to know how long teacher-development contract courses are likely to run.

All but one of the schools had a staff appraisal policy and in each of these schools there was a close link between professional development and appraisal.

# THE ROLE OF BOARDS OF TRUSTEES IN IMPLEMENTING THE NEW ZEALAND CURRICULUM

The *National Administration Guidelines* spell out the responsibilities of boards of trustees in relation to implementing the New Zealand Curriculum. The guidelines state that boards of trustees must "foster student achievement by providing a balanced curriculum in accordance with the national curriculum statements (i.e. the *New Zealand Curriculum Framework* and other documents based upon it)." In order to do this, each board, through the principal and staff, is required to:

- implement learning programmes based upon the underlying principles, stated essential learning areas and skills, and the national achievement objectives;
- monitor student progress against the national achievement objectives;
- analyse barriers to learning and achievement;
- develop and implement strategies which address identified learning needs in order to overcome barriers to students' learning; and
- assess student achievement, maintain individual records, and report on student progress.

In addition, the board is required to document how the *National Education Guidelines* are being implemented, and maintain an ongoing process of self-review.

We asked board members how they went about these responsibilities, beginning with a question on how they became familiar with the New Zealand Curriculum documents.

## Gaining Access to the Documents

In all but one school, principals made curriculum documents available to board members. The way they did this varied. In one school the principal had provided a complete set of documents in a permanent folder for each board member. More commonly one or two sets of documents were available for board members to share or documents were available in the school for board members to look at if they wished. In one school where the principal had made no effort to introduce the documents to board members, one board member had obtained them independently. No board members had received documents directly from the Ministry.

## Understanding the Documents

Principals in 6 of the 7 schools had introduced the documents to board members. Two principals had summarised each document as it came out. The other principals had explained the documents at board meetings, often with the help of senior staff or staff in charge of particular curriculum areas who gave examples of how the documents worked in the classroom. In 2 schools, individual board members

became familiar with the documents through their involvement in other educational bodies.

Board members and principals in 2 schools had attended courses run specifically to familiarise them with the documents and the board's role in relation to them. These courses reinforced the partnership between the board and the principal and staff and gave both parties the opportunity to work together on the documents, gaining understanding and clarifying their respective roles and responsibilities. A board member who had attended one of these courses commented:

> We were invited to take part in an educational process - 3 evenings run by the College of Education. That was a really good opportunity to get on board with the curriculum. I realised that board members do have an input into the curriculum and I felt quite comfortable with that.

Principals' comments confirmed this. One described how she ran 2 sessions on the *New Zealand Curriculum Framework* in which she showed board members the documents, gave them copies, and explained it. She also makes sure that several copies of every document are available for the board. Another principal, who attended a course with some board members, also took an implementation timetable, copies of the documents, and teachers' work plans to a board meeting so that other members could become familiar with the documents. At the other extreme was the principal who said his impression was that the documents would have been circulated to the board and that some of the board members may have glanced through them out of interest.

## Familiarity With Documents

Board members' familiarity with the documents varied. While most of those interviewed had read the *New Zealand Curriculum Framework*, not all were, or expected to be, familiar with the detail of individual curriculum documents. Most found the framework document relatively easy to read and felt it gave them sufficient overview without having to go into each subject in detail.

One member who considered himself quite familiar with the curriculum changes actually referred to policies rather than documents:

> We've approved the (school) policies and I've read those and I'm aware there are new curriculum and that we need to address the responsibilities at board level.

Several board members said they found the language of the documents off-putting and others appreciated the summaries made by the principal or put out by the Ministry. One described her experience:

> They're not easy reading, they're not leisure reading. I think with the science there's been a little leaflet and we've read that. We put the leaflets down and most of them are taken. You can't force people to read them and some board members say that's not their strength. The small leaflets are very user-friendly. They're a lot better than bringing the whole document to a board meeting.

Several principals thought it was difficult for board members to become familiar with the documents, particularly because of lack of time and professional expertise. One commented:

> They only have a certain amount of time to give to BOT things and they find it easier to cope with things like property than trying to get their mind round something like this so you can only present it in a minimal way.

Even though their knowledge of curriculum statements was likely to be limited, board members were generally positive about the curriculum and expected it to have a positive effect on children's learning. They liked its holistic approach, focus on the individual, and emphasis on problem-solving. They were also aware that its successful implementation depended on the skills of individual teachers.

Board members in 2 schools wanted more information on exactly what the differences were between the old and the new curriculum so that improvements could be identified.

## Legal Responsibilities of the Board

In 5 schools, board members were aware that their role was to ensure that the curriculum was implemented correctly. Board members at a sixth school only became aware of their responsibilities after an Education Review Office visit. In the seventh school, the chairperson had some awareness of the board's responsibilities but other board members did not.

The main concern in this area was how to carry out that responsibility appropriately. Board members appreciated having independent clarification and explanation of their responsibilities, either through an Education Review Office visit or through attendance at a course. Only one board member interviewed had had contact with the School Trustees Association (STA) in this respect.[23] The comments below typify the different stages boards were at:

> We have to make sure it's implemented - we've relied on the advice of the principal. We're starting to establish checks in the form of a policy manual - trying to decide how much information is needed and what.

> To be completely honest, till about October last year we pretty much thought it was the principal's responsibility and not ours. We've since been made aware (by Education Review Office) that it is the Board's ultimate responsibility which worried us a bit because we thought, 'We don't know anything about it so how can we see that it's being enforced or delivered correctly.'

Most principals were aware that boards had some responsibility for overseeing curriculum implementation although only 3 principals referred specifically to the NEGs and NAGs. One principal had been through the NEGs and NAGs with the board but "we haven't yet discussed their contribution". Another recognised that "according to the NEGs and NAGs they have a definite role in ensuring there's curriculum delivery". However, she thought it would take some time for board members to become familiar enough with the documents and school processes to be able to assess how the curriculum was being implemented. The third principal believed that:

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[23] This is not unexpected given that STA has no legal or official responsibilities in relation to boards of trustees. The Association was established under "Tomorrow's Schools" to support boards who become members by subscription. The Association provides guidance and direction to boards, primarily in the areas of governance and management. It sees curriculum matters as the professional responsibility of the Ministry of Education and ERO. This position is underlined in the resource booklet *Managing Curriculum Responsibilities* prepared by STA for boards of trustees in 1994. The booklet notes that while boards have responsibility for overseeing the implementation of the curriculum, they should negotiate arrangements with the principal. If boards do approach STA for help in this area, the Association is likely to refer them to the booklets being published by ERO. (Personal communication with STA.)

> In general terms they would see those things as being the teachers' business rather than having a specific role, and they would basically be relying on me and the senior staff to carry out their responsibilities in terms of that according to the NEGs and NAGs.

Teachers were much less sure what the boards' legal responsibilities are or how they should be carried out. Senior teachers in 6 schools recognised that boards have a role in ensuring that the curriculum is implemented but not all agreed how this should be done. Some of them, along with teachers at other levels, resented the boards having this responsibility and thought it should be left to the "professionals" to determine whether or not the curriculum is being implemented. Others simply thought the boards were too busy and changed personnel too often to be able to carry out this function. One senior teacher said:

> I sometimes feel they try to involve themselves too much. They should be aware of what's happening and I think they should ensure these things are happening in the school. The principal feels that really it's a professional thing - allocating the budget and how things are running within the school and how we organise our professional development, all those sorts of things. The board don't have a lot to do although we're informing them all the time of what's happening in the school.

At the other extreme was a teacher who said:

> I think it's ridiculous to ask them to be responsible for curriculum, to be perfectly honest. They're lay people. It's being pig-headed by government to expect lay people to walk in and look after the school and implement the curriculum. I know they have a legal responsibility but I think it's ridiculous to give them that.

## Establishing the Boards' Role in Relation to the Curriculum

While board members were aware they should take an active part in monitoring curriculum implementation, not all were clear how best to do this. Four boards were starting to develop policies for monitoring in association with the principal. The other 3 had interim systems in place which involved some reporting on curriculum matters by the principal and senior staff.

In one school, board members wanted to play a greater part in curriculum implementation but were inhibited by the attitude of the principal and limited communication between the chairperson of the board and other board members. In another school, board members thought that they were distracted from their long-term planning role by the day-to-day demands of running the school.[24]

Board members agreed that:

- setting priorities was the task of school staff,
- planning for implementation was the responsibility of school staff,
- developing policies was the task of staff although the policies should be brought to the board

[24] In a recent survey as part of the self-managing schools project, trustees were asked if there were any areas of the school where they would like to be more involved. Twenty-three percent of those who responded said there was, and curriculum was the area most likely to be referred to. (Wylie, 1994, p. 99). In this same survey it was reported that when principals were asked if trustees took part in decision-making on the curriculum the percentage saying they did had increased from 35 percent in the first year of the reforms in 1989 to 59 percent in 1993. (p. 117)

for ratification,

- monitoring curriculum implementation was the board's role, and
- boards had a role in resource allocation but depended on the staff to provide the information on which the allocation was made; in 3 schools, the principal took the major role in allocating funds.

As noted above, staff felt strongly that setting priorities and planning for implementation were a professional responsibility. One principal described the ambivalence felt by both teachers and board members in this respect:

> We are asking boards of trustees through the NAGs and so forth that they literally become more familiar with the professional area of the school. They're a little bit scared of it because it's not an area that they're familiar with or necessarily want to rush into. I don't think we're any different to anywhere else - we're a little bit, not scared of it, but we don't want to push it down their throat: nor do we want to relinquish an area that's professional territory.

A senior teacher in one school described the procedure by which policies were developed in her school which matched the board members' view of the process. No other staff specifically mentioned policy development although some schools did appear to work closely with board members in this area.

Several teachers and 2 principals described how they reported back to boards, and others noted that they were exploring different ways of reporting back to improve the quality of the information they give the board. As noted above, most contented themselves with saying that it was up to professionals to be responsible for curriculum implementation.

Few principals or staff discussed their board's role in resource allocation other than to say the board should allocate funds so that teachers could go on courses.

Several teachers put forward the view that the board's main role was to support them through understanding their workload, sending them on courses, and being personally supportive.

## Factors Which Helped or Hindered Board Involvement

Board members talked more spontaneously about factors which hindered their involvement in curriculum implementation rather than those which helped. These included:

- lack of time,
- lack of continuity,
- having a large amount of information to absorb,
- having to find ways to manage information,
- not feeling confident that they had the appropriate expertise or being apprehensive about their responsibilities, and
- having a poor relationship with the principal.

Lack of time was always mentioned first by board members as a hindrance to being involved in curriculum implementation. It was also mentioned far more often than any other single factor. All but one of the board members interviewed either worked full- or part-time or cared for several small

children or both. One chairperson had no children at the school whose board she was on, she had no paid employment and had been on the board for 12 years. This enabled her to devote far more time to her board role than trustees in other schools.

All board members interviewed agreed that maintaining continuity is both important and a problem. In one school, only one member of the previous board stood for re-election which meant the previous chairperson had to stay on in a co-opted capacity to ensure a smooth transition. They agreed that changing membership of the board could both reduce the board's overall expertise as well as limiting expertise to one or two people. Lack of continuity put pressure on principals to re-educate boards and increased the dependence of boards on principals.

One chairperson thought that it took a few years on the board for board members who were not professionals to become confident enough to ask questions, particularly in areas relating to curriculum.

Factors which helped them fulfil their role in implementing the curriculum included:

- having personal attributes such as common sense, analytical skills, enthusiasm, and commitment,
- attending courses,
- good communication with principals, and
- experience gained in other areas, such as management skills and familiarity with the school through mother-helping.

As already noted, some trustees had been on courses, usually with their principal, and both principals and trustees appreciated the opportunity to go through the curriculum documents and the board's responsibilities with a facilitator. Other trustees had not been on courses because courses were not available or were run at inappropriate times or because they had no time. Trustees at one school had attended a cluster meeting which had no specified outcome. All the participants learned was that. "we were all just as confused and we were reassured we weren't all as stupid as you'd think".

Two people had been to courses or "Teacher Only" days with staff. Others thought there would be no problem if they wanted to go, but lack of time prevented them. One person had regularly attended such days under a previous principal but did not do so under the new principal. One board member in a provincial town described the difficulty of getting information and training:

> Any course they've tried to run since I've been on the board has been cancelled due to lack of numbers. They advertised one on self-review. Myself and another board member put our names down for it but it was cancelled. We got our money refunded. Then we wrote away for the information and it was out of print.

## School Development Plan or Strategic Plan

A recent Education Review Office report, *Managing Future Uncertainty* (1995d), notes that strategic planning is an aspect of management that most boards and principals have yet to explore and apply to their school (p. 5). The report acknowledges the constraints and limitations on the extent to which schools can actually manage themselves, and points out that within the contractual obligations on schools there are few planning requirements and no specific references to strategic planning. The report, which came out after the field work for this study was completed, goes on to describe the process boards might follow in developing a strategic plan.

This should be helpful for the boards and schools we visited who were at different stages in the production of a school development or strategic plan. In all schools, the pattern was for the plan to be initiated by the principal, sometimes in association with senior staff, and brought to the board for ratification. While board members generally agreed that it was appropriate for the staff to initiate the plan, the chairperson of one board was less certain of this:

> The principal's already produced a plan for this year and that becomes a starting point. My understanding of it is that it's in the NEGs that it's up to the board to decide where the school's going to go and how they're going to grow or whatever.

One school had undertaken a process of self-review from which the plan would develop. The chairperson was considering bringing in a professional person to prepare the plan which would cover everything from 5-year goals to personnel, property, and curriculum matters. Another school used the performance agreement with the principal as their main planning document because it provided a direct line of accountability.

The board members interviewed were uncertain what a school development plan should cover and some referred to policies when asked about plans. There was little evidence of cohesive long-term planning by either school staff or boards.

Only 2 principals and one staff member referred to the board's role in planning. Their comments reinforced the view that the boards tend to be relatively passive in this area. In one school which was not following the Ministry's timetable, the principal advised the board of the approach she thought would be best and "they seem perfectly happy with that". In another, the principal had written the strategic plan "because they put a lot of faith in me" and had taken it to the board.

## The Charter

Board members in 4 of the 7 schools said their charter had recently been reviewed to incorporate the NEGs and NAGs. Board members in the other 3 schools were unclear what their charter covered. The *Education Gazette* of 30 April 1993 which sets out the revised national education guidelines states that "since these guidelines are deemed to be part of all school charters as from 30 April 1993, it is not necessary for any board to alter its charter". Some charters included a mission statement for the school and included reference to achievement goals for students.

## Monitoring

Few boards were confident about how to monitor curriculum implementation and the methods used varied greatly. Suggestions in the Education Review Office publication, *Self-Review in Schools* (1994a), may help with this, but there was little evidence that the schools were aware of this publication.[25]

Two schools were not following the implementation timetable put out by the Ministry. In one case, the board had confidence in the principal's approach and regularly received information on students' achievement. In the other, the board had no policies in place for monitoring implementation although syndicates did send brief reports to the board at each meeting. These did not contain information on

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[25] These publications are free to schools but they do have to request them.

children's achievement but did describe activities undertaken within syndicates.

Five boards did get information on children's achievement, particularly reading ages. In 4 schools this was grouped, while in one school, staff brought examples of individual children's work to board meetings. This raised issues of privacy which are currently being addressed.

A review of the minutes of board meetings showed that, from early 1991, boards were receiving regular reports from principals on some aspect of the curriculum.

As well as reports from principals and senior staff and summaries of children's progress, board members used their personal contacts with teachers to check progress in an informal way. Some also relied on their informal contacts with parents and the community to assess parents' satisfaction. They commented that parents were quick to report any dissatisfaction with what was happening in the classroom.

Board members from all schools raised the issue of getting independent confirmation of how well the children were doing. In 5 schools, board members thought that Education Review Office reports provided a useful independent overview, while board members from 2 schools referred to national tests as a way of measuring their school's achievement. However, they did have some criticisms of the process. Board members in 2 schools were critical of the policy of releasing documents to the media as opposed to having reports available for public scrutiny. Some thought the reports did not contain enough detail to be helpful; others thought that the Education Review Office adopted an unnecessarily legalistic approach. Typical comments were:

> There will still be the annual reports from Education Review Office on national levels against which you can work out your own school achievements. That's one guideline. We had an Education Review Office visit last year and we learnt a lot from that. They reinforced that what we were doing or planning to do was down the right track. I'd hate to see it ever lost.

> Sometimes I'm not sure about Education Review Office thing - they're there to make sure the legal requirements are going to be met but I don't know how helpful that is really. Advice and support would be good.

One staff member speculated that it would "quite interesting to get independent feedback [on programmes]. The board is saying they were going to get someone in to find out how our mathematics programme is going, someone different from Education Review Office who can pass on ideas". She thought this could be helpful to her rather than the board.

## Assessment

Assessment was seen very much as a school and staff responsibility, rather than the responsibility of the board. Four schools had an assessment policy which had gone before the board. None had followed a process which matched that outlined in the document *Assessment: Policy to Practice*. In 2 schools, the assessment policy was initiated by the principal and staff rather than the board. One school has made assessment a priority for the year, and the board supported this by providing resources for workshops and courses. In 2 schools, board members were not aware of any assessment policy. The 2 comments below illustrate the different stages staff (and boards) were at in establishing an assessment policy.

> They don't report on how they assess children.

We have followed the process - we normally discuss the outlines then something gets sent to parents as a whole. Then we review it and it comes out as a document. It starts as a principal's initiative.

## Maori Education

Board members at 4 schools discussed the relevance of the curriculum to Maori education. Two schools noted that there was some resistance from their communities to the introduction of Maori to the school. Others did not see any problems with incorporating Maori aspects into the curriculum or with using the curriculum documents with Maori students in mainstream, bilingual or immersion units. Finding suitably qualified or appropriate teachers was a problem. No board members were familiar with the draft Maori curriculum documents.

## Resourcing

With the exception of providing for technology, the level of funding available for the provision of classroom resources was not a major concern for most boards. The amount they made available tended to be what was left over after fixed expenses had been met. This was more of an issue for smaller schools who noted that their fixed costs were often comparable to those of larger schools but their budgets were smaller, which meant that there was less available for curriculum. Board members from the smallest school acknowledged that their budget was weighted against spending on the curriculum but this was because of prior commitments:

> It's commitments we can't do without like auditors' fees and accountant's fees, insurance. Those sort of things we have very little control over and the amount stays stable so if we're suddenly getting too close to the edge of our budget something's got to go . . . Our accounting and auditing costs must be comparable to a school with 200 - they've got to do the same thing but we have a smaller pool for that to come out of so the percentage of our money that gets spent on those things is higher.

Curriculum areas which were being given greater emphasis generally received more funds. A board chairperson described a typical process:

> I'm on the finance committee with the principal and one other. We work out expenses that have to be met then with whatever's over, we slot that into the curriculum. We have to be guided by the principal. We do like to know what's happening in the areas and if there's an emphasis in a particular area we like to know what resources are being put into it. I must confess we're not happy with $10,000 here and $5,000 there without knowing why.

Board members and teachers generally agreed on the procedures followed for budget allocations. One principal described it as follows:

> It is up to the teachers through the syndicates. They all have an input. It is collated by senior teachers into a school budget, then it's presented to the board. The board tells us how far we're out then I go back to the teachers.

The principal of one school said that his board had made a policy decision to put more resources into people, particularly aides and support people to help staff implement the curriculum. In another school, the board and the principal were negotiating as to how the budget would be decided. A teacher observed that:

> I think there's probably been a little bit of a power play with the board with who is actually going to have the power. Quite nicely, they're not hostile, but I think this is something that needs to be a little bit more structured, but that's happening.

The only additional money boards had received for curriculum implementation was money for teacher release days and small amounts for science. Some had made additional funds available for teacher release or to purchase resources in priority areas. In general, boards relied on principals to guide them as to what resources were needed.

## Other Factors Discussed by Board Members

### The Structure of the School

No board members thought the structure of their school adversely affected the implementation of the curriculum.

Two of the schools visited had immersion or bilingual units; one had a resource teacher for reading and an assessment teacher for children with special needs. The funding formula for the assessment class had changed and the school had had to resource some of the teacher aide hours from their bulk grant which did reduce the amount available for curriculum.

### The Nature of the Community

All boards referred to the difficulty of getting the school community actively involved in curriculum or board matters. All noted that the same small group of parents attended meetings, responded to questionnaires, or contributed to policy. Boards used questionnaires, newsletters, open evenings, and personal contacts to obtain community views with varying degrees of success. All made comments along the following lines:

> It's impossible to get people involved if they don't want to be. There probably are innovative ways you can reach them, like fun evenings with some education at the same time but you simply run out of energy. When people do perceive there's a major problem they don't usually hold back.

### The Ministry of Education's Timetable

Few commented on the Ministry's timetable for implementation. In 2 schools, principals had made unilateral decisions about whether and when the curriculum would be implemented. In both cases, board members tended to follow the principal's lead in relation to the timetable for implementation. While accepting the Ministry's timetable, board members in small schools were concerned about the extra pressure on their staff. As one said:

> I'm struggling with the fact that as a G1 school, the workload has been enormous and the principal's

workload has been right out of proportion. I do support it and I see us as being in a transition so of course there's going to be a heavier workload.

### Where Boards Would Go for Help

All board members said they would go to the principal first if they had problems relating to curriculum implementation. Board members in 3 schools said they might use STA for advice on curriculum matters but none had done so to date. Board members in one school noted with regret that STA no longer has field officers available for consultation. They had appreciated the opportunity to get support locally.

### Being a Trustee

Although few trustees regretted their involvement, they did talk about the time involved in being on the board, and the financial and personal costs to themselves and their families. One chairperson commented:

> I actually joined because I thought it was a good way to be involved in the education of my children but what I found it did was take me away from them when they were small to the school. . . . That's the downside of it. They all went through the school and I probably missed 6 years of their primary school at night time. I tried to make it up to them at weekends.

## Summary

The *National Administration Guidelines* spell out the responsibilities of boards of trustees in relation to implementing the New Zealand Curriculum. In most schools principals had explained the curriculum statements to board members as they came out. Most had read the *New Zealand Curriculum Framework* but did not expect to be familiar with the detail of individual curriculum statements.

Principals and teachers felt that setting curriculum priorities and planning for curriculum implementation were their professional responsibility. The boards' role was to allocate resources and monitor curriculum implementation. Board members thought that the 2 reasons likely to hinder their involvement in curriculum implementation were lack of time and lack of continuity of board members. Board members appreciated any opportunities to attend courses which helped clarify their responsibilities. They also thought their personal attributes and experiences were helpful.

Most board members were aware of their legal responsibility to ensure that the curriculum was implemented but were less clear about how they could carry out this responsibility appropriately. Clarification of their role had usually been assisted by visits to the school of the Education Review Office. Few boards were confident about how to monitor curriculum implementation and schools varied considerably in the development of strategic plans.

While boards of trustees have been doing their best to meet their legal obligations, they have been hampered to date by a lack of written material to help them. This is being redressed to some extent by the Education Review Office but most boards have to work out suitable processes by trial and error.

With the exception of technology, the level of funding available for classroom resources was not a major concern for most boards. The curriculum area which had the greatest focus within the school tended to have the largest funding allocation.

# CONCLUSION

This report presents the findings of a study designed to look at the implementation of the New Zealand Curriculum in primary schools based on case studies of 7 schools. Case studies proved an effective methodology for collecting data from principals, teachers, and members of boards of trustees about their reactions to the documents, and to isolate some of the factors which enhanced and hindered implementation, which was the major focus of the study. The limited sample does not allow us to generalise from the data as to what might be the experience in other schools, although it is likely that the issues raised through our interviews are common to the experience of others.

The schools varied considerably in the progress they had made towards implementing the New Zealand Curriculum and the reasons contributing towards this fact have been raised in the report and will be discussed further here. However, one abiding impression from the interviews was the positive reaction of principals, teachers, and members of boards of trustees to the content of the curriculum statements. While there was no doubt that many principals and teachers felt overloaded because of the number of curriculum documents with which they had to become familiar at a time when they were still coming to terms with structural changes within the education system along with never-ending social and other pressures, relatively few were critical of the content of the New Zealand Curriculum.

## Interpreting the Requirements of the New Zealand Curriculum

According to the *National Administration Guidelines* each board of trustees through its principal and staff "must foster student achievement by providing a balanced curriculum in accordance with the national curriculum statements". Existing syllabuses are to be regarded as national curriculum statements until they are replaced. The Ministry has produced a timeline to guide schools in the implementation process.

While the principals of all the case-study schools agreed that they were attempting to provide a balanced curriculum for all pupils, not all were doing this based on the national curriculum statements. They argued that they and their staff were in the best position to know the needs of the children in their school. Their view of their own autonomy encouraged them to make use of the curriculum statements when they considered them to be appropriate, but not to adhere to the Ministry timeline for implementation.

Few teachers, and not all principals and board members appeared to recognise the relationship between the *National Education Guidelines* and the *National Administration Guidelines*, and the *New Zealand Curriculum Framework* and curriculum statements. Teachers' lack of knowledge of the *National Education Guidelines* and *National Administration Guidelines* can largely be attributed to the fact that they perceive these documents as relating to management issues and as such the responsibility of principals and boards of trustees. However, another reason for teachers' (and indeed principals' and board of trustees members') lack of knowledge was the fact that these policy statements have only appeared as *Gazette* notices. It was surprising to us that such key policy statements had not been reproduced in a more permanent form. This lack of understanding of the

importance of the *National Education Guidelines*, including the *National Administration Guidelines*, almost certainly contributed to the fact that not all schools had systematic procedures in place to see that their requirements were met.

## The Daily Task of the Teacher

The main reason why implementing the New Zealand Curriculum was seen as such a daunting task for many teachers was that it had to be undertaken in addition to normal teaching duties. Many teachers have had some release time for teacher development, but for the most part they have still had to cope with the daily demands of a class of children. Children have to be taught now, regardless of whether or not a teacher is completely familiar with the latest curriculum statement. Teachers have to "keep the show on the road", while at the same time trying to keep abreast of curriculum development.

## The Personal Impact on Teachers

The majority of teachers were ambivalent about the effect on them personally of the curriculum change. While their workloads had increased, especially in the areas of planning, recording, and assessment, most recognised that they were in a transition phase. Many believed that once they had systems in place, their workload would ease.

Teachers' stress levels were aggravated by other factors as well as the demands of the curriculum changes, including dealing with the social needs of students, running extracurricular activities, meeting with parents, and attending to their own personal and professional development. The pressures sometimes created strains in their personal lives and could result in exhaustion.

## What Makes the Difference?

### The Leadership of the Principal

It is a commonplace of the literature about effective schools that the role of the principal is of crucial importance. Newth (1995) commented that:

> The most significant constraint to effective curriculum development in the schools that did not make satisfactory progress was the lack of curriculum leadership by the principal, his/her lack of support of staff in the curriculum development process, and lack of a shared vision and a clear focus (p. 36).

This view was certainly borne out in this study. It appeared to us that the principals in the schools which appeared to be implementing the New Zealand Curriculum most successfully were professionally confident themselves and fostered confidence in their staff. They were clear about their own goals and promoted staff cohesion.

### Availability of Teacher Development

This was clearly one of the most important means of ensuring school-based curriculum development and implementation. Strong leadership and mutual support within the school, along with a positive

attitude on the part of teachers helped the process of implementing the new curriculum but no amount of goodwill could substitute for staff development and opportunities for training. Because teachers had limited time to become familiar with the documents, teacher contracts and courses helped them focus on the documents and the implications for planning, teaching, and assessment.

**Staff Co-operation and Collegial Staff Atmosphere**

It was clear that where teachers were collegial and supportive they encouraged each other in their attempts to interpret the curriculum statements and put them into practice. Conversely, if a large enough group of teachers in a school were negative in their attitudes towards the curriculum changes, they were likely to hinder the attempts of others to implement the curriculum statements. Thus, to some extent, change within schools depended on the goodwill of individual teachers, which also matches outcomes reported on in Newth (1995).

**Teacher Attitude Towards Change**

We assumed when we started the study that implementing the New Zealand Curriculum was about managing change. As the body of the report shows, most teachers minimised the amount of change involved. One of the reasons they commonly gave for supporting the New Zealand Curriculum was that it was largely what they had been doing for years anyway. Teachers holding this view are supported by a recent statement by the Secretary of Education:

> For many teachers curriculum change is more about recognition of existing excellent classroom practice than about revolutionising what is happening in classrooms.[26]

Another explanation for teachers' attitudes may be that they were resistant to change and that change was a threat to the security of teachers. It is not surprising that change has the potential to cause anxiety in staff if they feel they cannot cope. A corollary of this may be that, as in Newth's (1995) study, teachers were used to operating autonomously in their classrooms and resisted expectations that they change. One of the factors acknowledged to be important in managing change is for participants to understand the extent of the change involved. It would have been helpful if, with the "new" curriculum statements, a summary statement had been included highlighting the main ways in which the "new" curriculum differed from existing syllabuses.

**Length of Teaching Service**

While many experienced teachers were familiar with and supportive of the new curriculum statements, the more recently trained teachers were more likely to be conversant with the documents, accepted their philosophy, and did not have the problem of having to modify existing classroom programmes. While many more experienced teachers commented on how difficult it was to keep abreast of all the new documents and how helpful it would be to have a breathing space to consolidate what they were implementing, others, particularly younger teachers, said it would be easier if all the documents were in place so that they knew exactly what was expected of them in each curriculum area.

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[26] See The *New Zealand Education Gazette*, Vol. 74, No. 12, 14 July 1995, p. 2.

**School Size, Including Whether or Not the Principal had a Responsibility for a Class**

The teaching principals certainly carried a double load of management responsibilities and classroom duties. On the basis of our small sample of schools, we cannot make a judgment on school size as a factor in implementing the New Zealand Curriculum. However, we formed the impression that the smaller and medium-sized schools perhaps had an advantage despite the fact that there were fewer teachers to carry curriculum responsibilities. We found that most teaching principals were more familiar with the curriculum statements than non-teaching principals, and this had positive effects within the school.

**The Strategies Used by Schools to Cope**

Schools were using a range of strategies to assist them with implementing the New Zealand Curriculum. These included:

- reliance on teacher-development contracts,
- the use of syndicate structures for curriculum planning and responsibility,
- the use of staff meetings to focus on curriculum areas,
- delegation of responsibility for specific curriculum areas to individual teachers,
- the development of a school-wide plan for curriculum implementation, and
- hiring support staff to assist teachers, for example, more assistance in the library or for resource management.

**School Planning and Monitoring of Curriculum Implementation**

Few schools had processes in place for monitoring the progress of curriculum implementation. We got the impression that principals and staff found coming to terms with the curriculum statements and developing plans for implementation to be so time consuming that they paid little attention to working out strategies to determine whether or not the curriculum had been effectively implemented, and what had been the outcomes for student learning. Staff who had for many years relied on their professional judgment to measure the success of the programmes struggled with the need to develop agreed systems for monitoring implementation.

Some principals and teachers appeared to be in rather an ambivalent position towards their own decision making. On the one hand they valued their own autonomy and yet at the same time appeared to be reluctant to become self-managing - to be waiting to be told what to do. The attitude of some towards planning would be an example, where some principals and teachers indicated they were only doing it because it was a "requirement" of the Education Review Office.

**Assessment**

Assessment was a major issue in each of the case-study schools. The teachers certainly believed that one consequence of introducing the *New Zealand Curriculum Framework* and associated statements, was that they were required to assess children more frequently and systematically than previously. Two continuing concerns raised by teachers were: how much should be assessed, and how should it

be assessed?[27] There may also be a problem with terminology. Do all teachers mean the same thing when they use the term assessment? Some teachers appeared to use the term when they were referring to simple recording of test scores.

Few schools had developed mechanisms for the aggregation of data. While most teachers claimed to have detailed assessments of individual pupil achievement in core curriculum areas, it was less clear what mechanisms schools were using to combine this information so that they were in a position to demonstrate that they were meeting the objectives of the *New Zealand Curriculum Framework* and were making a difference to student achievement.[28] The fact that the curriculum statements have been released in succession may have contributed to this situation, particularly if they are viewed in isolation from each other.

Concern about the lack of guidance given to schools to help them assess students led the Education Review Office (1995a) to comment in its recent publication, *Assessing Student Achievement* that if the requirements of the *New Zealand Curriculum Framework* were to be met:

> . . . teachers need considerable training in assessment practices and centrally developed assessment tools for their use. It is inefficient and unrealistic to expect each of the 2,700 schools nationally to devise its own tools and practices. Schools can invest significant time and energy in developing assessment policies and procedures which result in each school 'reinventing the wheel'. (p. 34)

### Links Between the New Zealand Curriculum, Teacher Development, and Appraisal

Most schools had teacher development and appraisal policies and there was a link between the two. Schools that were engaged with the curriculum implementation process were developing an understanding of what was involved in implementing each curriculum statement. Some used this information to plan teacher development and establish budget priorities for the future. Individual teachers might also specify development in a curriculum area as the focus for their appraisal, but in only one school was there a clearly stated policy to monitor teachers' implementation of a curriculum statement as the main part of the appraisal.

### The Role of Boards of Trustees

Under the Education Act 1989 boards of trustees have the responsibility for managing schools including the implementation and monitoring of the official curriculum. It is expected that boards will work through the principal and classroom teachers to achieve this. The interviews we carried out with board members highlighted a number of differences in the way boards see their role and the way in which others such as the Ministry and staff see it. Similarly, the expectations the Ministry and Education Review Office have of boards can be quite different from what principals expect or boards are currently able to deliver.

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[27] Teachers should find the assessment strategies for the *New Zealand Curriculum Framework* as suggested in Croft (1995) helpful.

[28] This finding supports the conclusions of an earlier exploratory study of assessment aggregation in schools which emphasised that "Without aggregation, a school loses significant capacity to track its own progress" (*see* Hall (1994) p. 31). However, Hall also acknowledged the workload for teachers involved in reporting on all achievement objectives and recognised the need for teacher development to foster teachers' skills as assessors and evaluators.

The evidence from the 7 case-study schools suggests that there may be a need for the Ministry of Education and Education Review Office, as well as individual schools, to clarify the responsibilities of the board of trustees, principals, and classroom teachers. Increased understanding of their respective roles might help to reduce some of the negative attitudes expressed in this report.[29]

While boards in the schools we visited varied in the extent to which they were involved in curriculum implementation, a number of common factors emerged:

- The attitude of the principal was a key factor in how boards dealt with their responsibilities in relation to implementing the curriculum.
- The chairperson of the board tended to play a disproportionate role in managing the board's responsibilities. He or she generally had more knowledge than other board members and closer liaison with principals. The chairperson sometimes controlled the flow of knowledge to board members and their participation in board activities.
- The views of board members and the issues they faced were largely independent of the size of the school.
- Board members often felt they lacked the knowledge, skills, and resources to meet their obligations.

**Boards and the Principal**

Our impression was that although in recent months most school principals had included a section on the curriculum in their regular reports to the board, most boards of trustees and staff regarded the curriculum as a professional responsibility to be largely left to the principal and teachers while at the same time recognising that boards had to comply with the requirements of the NEGs and the NAGs. It is interesting to note that one of the recommendations of Newth (1995) is that:

> the board of trustees' role in curriculum management be clearly delineated so they know what is expected of them and contractors likewise know precisely where they stand. (p. 39)

Board members were dependent on the principal for access to documents, explanation of the curriculum changes, guidance on planning, monitoring and assessment, and establishing priorities for resource allocation. Boards appeared to have little in the way of independent support or guidance and, in a number of practical ways, were not treated as independent authorities by the Ministry. For example, the Ministry does not send curriculum documents directly to boards, yet doing this would be a simple way of ensuring that board members at least see the documents. The School Trustees Association sees curriculum matters as a professional responsibility. In their view, guidance and support on curriculum matters should come from the Ministry of Education or the Education Review Office. While the Education Review Office is in the process of publishing a series of booklets which

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[29] The data used in this report come from only 7 schools. However, the findings are supported by comments made by the Education Review Office in its annual report (1995) which notes the "very wide range of competence in the performance of school governing bodies" (p. 6 ). In a second publication, *Effective Governance: School Boards of Trustees* (1994), the Education Review Office refers to the fact that the system of local management of school boards is a process which "should continue to evolve over time as Boards become more aware of their role and responsibilities, as they become more skilful in carrying out this role through ongoing training and as they are able to influence the achievement of the children for whose benefit they were first established". (p. 37)

will be helpful to boards, a number of board members wanted independent information about curriculum documents, perhaps in the form of a summary of each document setting out its aims and objectives, how it differs from previous curriculum documents, and identifying what boards should be looking for. They thought this would clarify and reinforce the board's role in overseeing their implementation. Some acknowledged that the recent series of curriculum information pamphlets published by the Ministry of Education for parents and trustees helped in this way.

At present, boards are largely dependent on principals' explanations of what the documents mean. Very few board members had attended courses relating to curriculum, partly because there were few such courses available and partly through lack of time. Even where board members did become familiar with the documents, continuity could be a problem. We interviewed board members over the board elections and a high proportion were not standing again or were new to the board. Where the composition of the board changed markedly following an election, the overall expertise of the board was reduced, knowledge became limited to one or two people, usually including the chairperson, and there was pressure on the principal to educate new board members.

**Planning and Monitoring**

There was little evidence in the 7 case-study schools that boards were engaged in long-term planning with relation to curriculum implementation. Most were uncertain as to how far the board should initiate school planning and how far that should be a staff responsibility. Confusion over roles and responsibilities was also evident in the areas of monitoring and assessment.

Boards relied on principals to provide them with information on progress within the school. The kind of information they got ranged from a brief curriculum report covering activities undertaken in the school, to more detailed information on progress, particularly in reading and mathematics. Most board members wanted more guidance on appropriate methods of checking progress in the school, particularly methods which would give them independent confirmation of the information offered by staff. A suggestion in the Ministry's (1994) publication *Assessment: Policy to Practice* that assessment policy might originate with the board, highlighted the dilemma board members faced. Board members were clear that they did not know enough to initiate such a policy and saw that as a staff responsibility yet the Ministry document seems to imply that the board should take the initiative. This indicates either that the Ministry needs to review its expectations or that boards need to be given more training and support in carrying out their tasks. The Ministry would need to consider the appropriate avenue for providing such training. Presumably if this training were to be carried out by the School Trustees Association it would need to be through a contract arrangement. Most board members were not aware of the National Education Evaluation Reports of the Education Review Office, including the third report (1994a) *Self-Review in Schools*. (One chairperson did seek a copy of the former publication, but it was out of print at the time.) Boards may need to be advised or reminded of the availability of documents such as these.

**Resource Allocation**

In determining what funds would be available for curriculum implementation, most boards felt constrained by the level of fixed costs they were required to meet. They did not feel able to establish curriculum needs first and adapt other expenses accordingly. Larger schools had some flexibility in adjusting their budget priorities to meet curriculum needs but smaller schools had little room to move.



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**Responsibilities and Resources**

Board members were generally in favour of the board system (some had no experience of any other system), but they were universally concerned about the level of responsibility boards were expected to meet. They made a number of suggestions for resources that would help them meet their responsibilities in relation to implementing the curriculum. They particularly wanted examples of ways of monitoring and assessment. Suggestions included:

- a seminar on the nature of the curriculum changes,
- courses for board members,
- draft guidelines for monitoring curriculum implementation, including examples of how the principal could report to the board,
- visits to other schools, and
- a video about board responsibilities.

Responsibility for implementing such suggestions should, in the view of board members who commented, not be the sole responsibility of the School Trustees Association, but shared by the Ministry of Education and the Education Review Office.

Boards of trustee members highlighted some of the ambiguities of their position as they see it; they are elected democratically and theoretically have autonomy but in practice are required to implement the curriculum as set down by the Ministry of Education and are assessed and reviewed by the Education Review Office to see whether they meet Ministry of Education standards, while at the same time receiving only limited support to carry out their duties. The constraints on the autonomy of boards is spelt out in the recent Education Review Office, National Education Evaluation Report *Managing Future Uncertainty* (1995d):

> Although New Zealand schools are often referred to as 'self-managing this is only partly true. There are some real constraints and limitations on the extent to which schools actually manage themselves . . . . In addition to providing a framework within which schools must operate, the Government still has considerable control over the operation of the schools owned by the State. It does this in order to ensure accountability, to ensure cost effectiveness, to establish consistency between schools, to maintain minimum standards of quality in the delivery of education and to ensure its educational objectives are met. (p. 5)

On the basis of this study we would certainly question whether there is "consistency between schools" in terms of implementing the New Zealand Curriculum.

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# APPENDIX 1

**NB:** Three interview schedules were used during the study: Principals, Teachers, and Boards of Trustees. As the issues covered were largely the same, but from different perspectives, and the format of the documents was similar, only the Principals' Interview Schedule has been included here.

IMPLEMENTING THE NEW ZEALAND CURRICULUM

PRINCIPALS' INTERVIEW SCHEDULE

**CONFIDENTIALITY**

*As you know, the Ministry has asked us to look at the impact on primary schools of the implementation of the New Zealand Curriculum, looking particularly at those factors which have helped or hindered change.*

*In order to do this we have to keep a number of policy documents in mind.*

- *The National Education Guidelines (NEGs) which include the National Education Goals and the National Administration Guidelines (NAGs).*
- *The New Zealand Curriculum Framework, the major policy document which underpins the NZ Curriculum.*
- *The various curriculum statements.*
- *The guidelines on assessment for schools, Assessment: Policy to Practice.*

**I How schools are interpreting the requirements of the New Zealand Curriculum, and how much change is entailed**

1) Firstly, as principal what do you consider your responsibility to be in relation to the documents?

What procedures did you follow to introduce the *New Zealand Curriculum Framework* and other documents to:

- your staff
- the Board of Trustees

Probe

*NZ Curriculum Framework*

Curriculum statements:

Mathematics

Science

*Assessment: Policy to Practice*

*National Education Guidelines* (NEGs)

*National Administration Guidelines* (NAGs)

2) What have you done as a staff to examine the various documents?

- How familiar do you think your teaching staff are with the documents?

3) Do you think your staff recognise the relationships between the various documents?

4) Would you say that you and your staff are in basic agreement with the philosophy and principles on which the documents are based? Are they viewed positively?

Probe

Same list of documents

5) How much change do you think is involved in implementing the New Zealand Curriculum as outlined in the NZCF?

Probe

Same list of documents

Change in terms of:

- content
- teaching approaches
- learning outcomes
- tension between content and process
- depth of change possible/superficial change only
- impact on children
- teacher workload
- level of school
- same/more/less being taught

6) What would you say you have learnt about curriculum implementation from your experience with the mathematics and science statements which will assist you in implementing the English, social studies, technology and later curriculum statements?

Probe
- Are staff familiar with any of these latter documents?
- Is their implementation being considered?

7) Have you any comments to make about the New Zealand Curriculum as it relates specifically to Maori education?

- Draft Maori curriculum statements

8) We are going to be talking to at least the chairperson of your Board of Trustees about the responsibilities of the BoT in curriculum implementation but we are also interested in your views.

Have you any further comments to make about how BoT members are kept informed about the various documents?
How familiar do you think individual members are with the documents?
In what ways do you think the BoT should contribute to curriculum implementation?
Have you discussed their contribution with them?
Do you think board members do contribute in the way you think they should?
What are some of the constraints?
e.g. continuity of BoTs

**II Planning processes for curriculum implementation at both the school and classroom level**

1) Do you have a strategic plan or school development plan for the school?

What are the key elements of the school development plan?

Probe

- self-managing school: school goals
- school policies
- regular review process of school development plan
  systematic self-review
  Is it a "living" document?
- Who is responsible for what in the review process?
  - classroom level
  - school level
  - BoT
  - combination of BoT and staff
  - school policy that guides resource allocation

How closely are you able to adhere to your school development plan?

2) What about the curriculum as part of the school development plan? How does the implementation of the New Zealand Curriculum relate to the school's development plan?

Would you please describe the planning processes you have within the school for curriculum implementation.
Would you say planning for curriculum implementation at your school is long or short term?

Realistically, how far ahead do staff think they can plan for curriculum development? Is it only year by year or can they look ahead for say 5 years?

**III The methods the school is using to monitor curriculum change**

1) First, have you got any systems in place to review the process of curriculum implementation?

- are curriculum management systems in place
- curriculum implementation and evaluation of delivery
- how is evaluation of curriculum implementation undertaken - use of student work

What about the NEGs and the NAGs?
How well do these systems work?
Are there any problems?

**Assessment**

2) An integral part of the New Zealand Curriculum is school-based assessment to improve students' learning. In the guidelines on assessment, various steps are listed as being desirable for the development of a school assessment policy (*see* p. 6) Is your school following this process?

Have you a school policy on assessment?
There are three broad areas to do with assessment which I would like you to comment on.
First, classroom assessment for student learning. Can you tell me what some of the issues in relation to student assessment are?
- level of school

Second, could you comment on the policy and practice in your school of assessment for accountability through the aggregation of data.
Third, could you comment on assessment for reporting in your school.
- to inform the BoT
- to inform parents
- to inform ERO

Could you comment on any assessment issues in relation to the science and mathematics curriculum statements.

**IV. Factors which assist with or are constraints to change**

1) Implementing the NZ Curriculum is about managing change. I'd like to talk with you about what you consider are the factors which assist change and those that are constraints to change. Various things come to mind, but perhaps you could start by suggesting say 3 factors which you believe have assisted change in your school and 3 which have hindered change.

2) Could we look further at some of the structural constraints on curriculum implementation. For example, what is the impact, if any, of such things as:

size of school, including principal being teaching or non-teaching
staff turnover
school and class timetables
syndicate structures
paired teaching
vertical groupings
whanau organisation
locality:
- urban or rural
- nature of school's relationship with the community
- community attitudes as barriers to implementing key documents

3) Let's move on now to resourcing.

- What policies do you have for priority allocation of resources?
- How are curriculum priorities determined?
- Did the school receive extra financial resources for curriculum implementation?
- Is there an adequate pool of relievers available to, for example, allow teachers to take part in teacher professional development projects?

4) People, particularly teaching staff, must be an important factor in successful implementation.

- What factors do you think encourage or hinder staff participation in the implementation of the New Zealand Curriculum?
- What do you consider your role as principal to be in managing curriculum change?
- What about senior and middle management?
- Would you describe yourself as committed to curriculum change?
- What about your staff?
- How would you describe the level of collegiality of staff?
- To what extent do teachers work co-operatively?
- Would you say experienced staff welcome the contribution of less experienced staff?

How is the school using the information they have about factors which assist or hinder change to guide their future planning?

**V. The implications of the curriculum reforms for staff and school development and appraisal**

1) Are the level of staff skills and knowledge a constraint in implementing the New Zealand Curriculum?

- same documents

2) Would you please outline what is happening in your school in terms of teacher professional development.

- planning
- resources

3) To what extent do you think the teachers are self-managing their own teacher development?

4) How do you see the relationship between the development of individual teachers and whole school development?

5) I'd like to talk about the Ministry's teacher professional development contracts and other teacher professional development.

*[Paper to be completed by principal if school has been involved in any Ministry contracts and other teacher professional development, listing those curriculum areas involved and the staff who participated.]*

Could we start with the Ministry's teacher professional development contracts.
In general terms, how effective do you consider the contracts to have been?

Probe

- What teacher development model was used?
- How effective do you think the model used will be in bringing about change in teacher effectiveness in the short and long term?
- What, if anything would be needed to improve their long-term value?
- Have any teachers been used as facilitators to work with teacher support staff in running teacher development courses?

If so, what was the impact on:

- the teacher
- the school

Were you, as principal, a participant in the teacher professional development contracts?

- What impact do you think the contract system of teacher professional development has had on the process of change?

  Can you comment on how this compares with earlier years?

If the school has **not** been involved in the Ministry's teacher professional development contracts, why was this?

Have you and other staff been involved in teacher professional development offered by other providers?

Probe

- Why were these particular courses/people chosen?
- What model was used?
- How effective was the model?
- Has the availability of suitable people to lead teacher professional development programmes been a problem for your school?
- In theory, teacher development in relation to the New Zealand Curriculum should be available for all teachers. Is this the reality?
- If teachers have a problem in a curriculum area once a teacher professional development contract has been completed, where do they go for support?
- Is there anything about the locality of your school or its size and composition, which you think has added to your problems of providing adequate teacher professional development?

6) Have you co-operated with neighbourhood schools with regard to implementing the New Zealand Curriculum?

Combined workshops with other local schools held relating to:

- Ministry professional teacher development
- Other professional teacher development
- The NZCF
- Curriculum statements
- The NEGs and NAGs.

What was the impact on your school?
Are staff at neighbouring schools seen as possibilities for "expert" advice and models for other teachers?

8) Would you mind describing for me the systems of staff appraisal that are in place in your school.

What, if any, are the links between teacher professional development and appraisal?
Are there any links between appraisal and the implementation of the New Zealand Curriculum?

**VI The personal impact on teachers of the implementation of the New Zealand Curriculum and their reactions to change**

1) In broad terms, how do you think your staff are coping with the changes involved in implementing the New Zealand Curriculum?

Probe: Same documents
How do you feel about the pace of change? Do you think staff have time to reflect on the documents?

2) Do you think most teachers believe the curriculum reform is achievable? What is their reality?

3) Do you think the implementation of the *New Zealand Curriculum Framework*, the NEGs and NAGs, and the curriculum statements have had an impact on staff workloads?

4) Has the impact of implementing the NZ curriculum been compounded by other changes and requirements within the school?

   Are there other external requirements which have added to the pressures involved in implementing the New Zealand Curriculum?
   What, if any, is the impact of ERO visits on curriculum implementation and the requirements for record keeping?

5) Do you and other staff believe the implementation of the New Zealand Curriculum, has had, or will have consequences for children's learning? In other words, will it make a difference to the educational outcomes for children?

   Same documents
   - level of school

**VII Children's Learning**

In the end the curriculum is to do with childrens' learning. Do you think the New Zealand Curriculum has had an impact on children's learning, or will have in the future?

CONCLUSION

Thank you. That's all I've got to ask you. Are there any other comments you'd like to make?

THE cover design by John Gillespie features a motif made famous by Gordon Walters, the New Zealand artist who died in 1995. Gordon was Art Editor for the School Journal from 1968 to 1971.

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